Probationary Period – Performance Management
Classified Civil Service Employees

Contact your Human Resources partners regarding the following topics related to Probationary Periods/Performance Management:

- For **Performance Issues/Probationary Removal/Policy Interpretation**, contact your Employee and Labor Relations (ELR) Senior Representative
- For **Deadlines/Process & Form Management**, contact your HR Consultant

You can locate your department’s ELR Senior Rep. and/or HR Consultant at [https://hr.osu.edu/directory/](https://hr.osu.edu/directory/)

**OVERVIEW**

In accordance with the Probationary Period Policy, a **180 calendar-day** probationary period is required for non-bargaining, certified status-eligible classified civil service (CCS) employees to review performance during the initial period of employment or after certain changes in classification. The probationary period is a critical time for the manager to ensure the probationary employee receives proper training, coaching, and feedback, to successfully perform the essential duties of their job.

During the probationary period, the manager should take time to monitor and review the employee’s job performance and conduct. An employee whose performance is unsatisfactory during a “first position” (an individual’s first CCS position with the university) may be terminated. An employee whose performance is unsatisfactory following a promotion or lateral job change may be returned to their former classification.

**The Probationary Period is the time to go over:**
- **University Shared Values**
- University, college and department policies and procedures
- The organization’s structure
- The college and department culture
- Job duties and expectations
- Attendance expectations, policies, and procedures
- How performance is measured
- Resources available

It is important for a manager to promptly identify and address performance issues or inappropriate conduct that occur during the probationary period. If a manager becomes aware of performance issues or inappropriate conduct and fails to take action, the manager is inadvertently approving of these behaviors. It is imperative to take timely action during a probationary period to remove an employee if the level of performance and conduct warrants termination.
Employees are expected to meet performance and conduct expectations during their probationary period which include:

- Complying with university policies and unit specific work rules.
- Aligning their conduct with the university’s Shared Values.

A manager in a unit must provide coaching and feedback to a staff member during their probationary period. This feedback can be documented utilizing the Probationary Progress Review form.

THE FIRST 30 DAYS – MANAGEMENT BEST PRACTICES

The first 30 days after an employee is hired is a crucial time to introduce new employees to the culture of the department. Starting off on the right foot paves the way for a successful employee/employer relationship. Managers should provide clear performance standards so the employee understands what is expected and how they will be measured. Reviewing any applicable attendance and/or dress-code policies, as well as departmental guidelines with new hires is also important in establishing expectations.

The manager should endeavor to meet/check-in with new hires several times during the first 30 days to provide feedback and answer questions. Managing during a probationary period is not just about managing negative situations. The probationary period is also the time for establishing a positive and solid manager/employee relationship.

The manager should provide all the necessary training, tools, and resources for the employee to be successful in their position. It is important for managers to document all training, coaching, and feedback sessions. If the decision is made to terminate the employee before or near the end of the probationary period, the manager must provide sufficient written evidence/documentation that clearly demonstrates the manager has collaborated with the employee to attempt to address performance concerns.

MONITORING AND ASSESSING PERFORMANCE THROUGHOUT THE PROBATIONARY PERIOD

Employees who are “on-track” to successfully complete the probationary period - The manager should continue to provide ongoing coaching and feedback.

If at any time performance/behavior/attendance declines before the probationary period is exhausted, the manager should document the issue and ensure due process is provided. Due process means the employee should be: 1) notified of the issue and, 2) given the opportunity to improve. If a significant issue arises, the manager should contact their ELR Senior Representative immediately for guidance on how to navigate the issue.

Employees who are “off-track” to meeting probationary performance expectations - The manager should have discussed the concerns with their ELR Senior Representative well in advance of the final assessment. All discussions regarding performance concerns or areas targeted for improvement should be fully documented. The manager may recommend a probationary removal at any time during the probationary period in consultation with ELR.

COMPLETING AND DELIVERING PERFORMANCE ASSESSMENTS (60& 120-DAY INTERVALS)

At or around the 60- and 120-day periods, the manager may complete and deliver a Probationary Progress Review to the new hire. The manager should review all aspects of the assessment (including areas of success and areas requiring improvement), as well as present specific examples and documentation that supports the assessment. The assessment scores should accurately reflect the employee’s performance and ability to meet the expectations of the job. It is also important for the manager to share their expectations for the next assessment, especially if it involves areas of improvement. The manager should discuss if there is additional training, tools, or resources that may be beneficial to improve performance. Although this is the time for the
manager to review performance with the employee, it is important that all relevant conversations, formal or informal, involve open dialogues between the manager and the employee.

**FINAL ASSESSMENT AND PROBATIONARY REMOVALS**

Prior to or at the final assessment, the manager should determine if the employee meets expectations and is a good fit for the department or is recommended for termination. If utilizing the Probationary Progress Review, the manager should complete the last section of the assessment. The ELR Senior Representative will guide the manager in the removal process. **Remember: the manager cannot remove an employee without ELR approval.**

In some cases, a probationary period may be extended (e.g., for [use the specific language from the probationary policy about unpaid leave and periods of paid leave], a University State of Emergency). Extensions can only be approved after the manager consults with the ELR Senior Representative. **If the employee has successfully completed expectations for performance** - Enter department-specific instructions. For example: “Submit the completed final and signed assessment to the HR Consultant to attach to the employee’s personnel files.”

**If the employee has not successfully completed expectations for performance** - The manager should contact their ELR Senior Representative prior to any conversations with the employee and discuss a probationary removal. Please keep in mind that a probationary removal can happen at any time during the probationary period provided the manager has had ongoing conversations with the ELR Senior Representative and employee, and performance concerns are accurately documented. Some issues such as serious misconduct or job abandonment may require immediate removal. The manager should submit a formal request for removal at least two weeks prior to the 180TH day. The ELR Senior Representative will guide and assist the manager on all required documentation steps, as needed.

**IMPORTANT RESOURCES**

- Performance Improvement and Corrective Action (Employee and Labor Relations)
- Summary of Conversation Coaching Worksheet
- University Rules for Classified Civil Service
- Probationary Policy 5.10
- Probationary Removal/Demotion Request Form (Submit to Employee and Labor Relations)

**ADDITIONAL PROBATIONARY PERIOD BEST PRACTICES**

- In addition to determining whether a new employee is a good fit, this period is a wonderful opportunity to build employee engagement with the department and college. Get to know the new employee and make them feel part of the team.
- Schedule meetings ahead of time to discuss performance. This will help ensure that the manager provides regular and consistent feedback.
- Do not hold it against the new hire if you have not had ample time to train them regarding a process or procedure. Unsatisfactory progress may be out of their control.
- Be realistic with expectations – a new employee cannot be expected to do everything proficiently at first.
- Be mindful of too many people giving directions and feedback that differ.

Assign a “buddy” to help orient and answer questions during the probationary period. Select a “buddy” that is collaborative, has effective communication skills, exhibits a positive attitude, and is knowledgeable about the job.