



PROBATION POLICY AND PROCEDURE

1. Introduction

- 1.1 This policy outlines the School's commitment for the fair and equal treatment of new staff with regard to probation and also for existing staff who are promoted internally.
- 1.2 Contracts of employment will include a probationary period for all permanent and fixed term newly recruited non-teaching staff. Teacher's performance management covers performance during probation. The objective of the probationary period is to ensure that employment with the School is based on mutual trust and confidence, the required skills, knowledge and performance and the shared commitment to student progress.
- 1.3 Non-teaching (support) staff who are promoted internally e.g. from Specialist Support Assistant to Higher Level Teaching Assistant will be subject to a further probationary period in the higher level role.
- 1.4 The period of probation will normally last six months or until such time that a new or promoted staff member is formally confirmed in post. In the unlikely event of a new staff member changing jobs within the first 6 months, the remainder of their probationary period goes with them to the new post.
- 1.5 Fixed term appointments for up to 12 months will usually be subject to a three month probationary period. Where a fixed term appointment is for 12 months or more this will normally require a probationary period of six months.
- 1.6 The probation process enables new and promoted members of staff to gain a full understanding of their role and what is expected. This is achieved through setting objectives, a regular review of performance and regular meetings between the new/promoted staff member and their manager.
- 1.7 If a new staff member has failed to meet the required expectations of performance, conduct, timekeeping or attendance during their probationary period then action to terminate employment may be taken, or the probation period may be extended. The extension of the probationary period would normally be for a maximum of three months. If, following that extension, no improvement has been made then employment will be terminated. If it is obvious from progress against objectives, attendance or conduct concerns that the new staff member is not going to meet the probation requirements, termination of employment may be considered at any time (i.e. prior to the completion of 6 months service).
- 1.8 If a member of staff who has been promoted internally has failed to meet the required standard of performance, conduct, timekeeping or attendance in their new role, they may be required to step down to their previous role (if available) or offered an alternative. If no suitable alternative vacancies are available, then the Capability Procedure should be used to deal with the matter (see 2.14).

2. Policy and procedure

What happens during my probation and what support can I expect?

- 2.1 At the start of your probation upon joining the school, your manager will:
 - agree objectives and targets covering the duration of the probation period

- enable you to undertake the school's online induction programme and complete required reading of the Staff Handbook and school policies
- explain the school's values and Golden Rules ©
- explain your job role and what is expected
- identify any personal development and learning needs you may have including mandatory training.

For staff who are promoted internally, your manager will agree objectives and targets, offer guidance and training and assign you a mentor as necessary.

2.2 The BlueSky professional development page is used to record objectives and details of each review stage. The stages are: initial objective setting, 4 week review, 3 month review and 6 month review.

2.3 Throughout your probationary period your manager will meet with you regularly to discuss your progress and, if required, make amendments to your objectives. During meetings your progress and achievements will be reviewed. This review will also consider your performance in relation to the:

- values and Code of Conduct: The Golden Rules ©
- leadership capability if you are a manager
- conduct
- requirements of the role
- timekeeping and attendance, including sickness absence
- overall performance in the job/success of the promotion

2.4 The overall assessments will also be reviewed in BlueSky by your Head of Department.

2.5 It is your responsibility to use the opportunity presented by the probationary period to identify areas for your own development and to contribute fully to the review meetings held with your manager.

How does your probation period fit with the performance management process?

2.6 During the probationary period upon joining the school you are not required to have an annual performance review. Staff who are promoted internally will continue to have an annual performance review taking account of their previous and current roles. Pay progression is subject to satisfactory performance. For the new role this will be considered upon completion of the probationary period following internal promotion.

2.7 If you complete your probation period before the end of the academic year in August, you will need objectives to be set as part of the Performance Management (PM) process to cover the remaining months to the end of the review year.

2.8 At the end of the review period, on confirmation of employment, your manager should discuss and agree priorities and objectives as well as put together a new personal development plan. This should cover the remainder of the review year and will form the basis for your annual performance review.

Completion of probation

2.9 At the final stage of your probation, achievement of objectives and performance against values and the Golden Rules © are formally reviewed and assessed, together with timekeeping, attendance and completion of the induction and mandatory training. For staff who are promoted internally your overall performance and the success of your promotion will be reviewed. There are three potential outcomes:

Confirmation in post

2.10 If the majority of objectives have been achieved and performance in relation to values and the Golden Rules ©, is considered to be effective and general conduct and timekeeping and attendance are satisfactory, plus induction and mandatory training have been completed, you will be notified in writing of the successful completion of your probationary period. For staff who are promoted internally, successful appointment to the higher level post will be confirmed.

Extension of probation for new staff

2.11 If your performance, conduct, timekeeping or attendance are considered unsatisfactory at any time then your manager will discuss these concerns at the earliest opportunity, making clear what's expected in terms of your objectives and standards of performance, conduct, timekeeping and attendance and give you the opportunity to improve.

2.12 If you fail to meet the required standards of performance, conduct, timekeeping or attendance, or need more time to complete the induction and mandatory training, your probation may be extended to allow you more time to do so. During this period your manager will:

- set out the areas where improvement is needed
- continue to monitor your progress
- help you overcome any difficulties you may be experiencing through coaching and training.

Dismissal of new staff

2.13 It is hoped that all staff meet the requirements and pass their probation. However, there may be occasions when the requirements of the probationary period are not met and your employment is terminated. The procedures for termination are:

- a written statement will be provided describing the matters of concern about your performance, conduct, capability, timekeeping or attendance which arise from your probation reviews at least 7 calendar days before a meeting to discuss this;
- a meeting will be arranged with your Head of Department (or the Headteacher as appropriate) and the Head of HR to allow you to respond to the written statement. The date of the meeting will be sufficiently far ahead for you to review the statement and consider your response. This will usually be 7 calendar days. You may choose to be accompanied at the meeting by a trade union representative or a work colleague. The companion may not answer on your behalf any questions put to you.
- You have the right to appeal against a decision to terminate your employment on the grounds that you have not met the required standards of your probation. Appeals should be made in accordance with the School's Appeals Procedure.

Managing unsuccessful promotion

2.14 If you have not met expectations during the probationary period following an internal promotion, the above procedure (for dismissal of new staff) will be followed with the possible outcomes being:

- The opportunity to step down to your previous role or a suitable alternative if no longer available
- Use of the Capability Procedure in your current role

- In exceptional circumstances, a time-limited extension (of maximum three months) to the period to enable you to meet expectations. Such circumstances may include training that could not yet be completed or unexpected absence for a significant reason.

3. Roles and responsibilities

3.1 Your role: it is your responsibility to get to know your role and the school as quickly as possible during the probation period by:

- understanding the purpose of probation and the standards of performance and conduct expected, including the rules and requirements on absence and timekeeping and the school's values and Golden Rules ©
- completing the school's induction programme, required reading and mandatory training
- if you are a line manager, to demonstrate your management capability and to manage your team effectively
- meeting agreed objectives within set deadlines
- fulfilling the requirements of the job description
- discussing with your manager any requirements for training/guidance that you feel is necessary to help you achieve the expected standard of performance
- raising concerns and queries as soon as they arise

3.2 Your manager's role: your manager is responsible for managing the probation process. It is their responsibility to:

- clarify the role and responsibilities in line with the job description
- explain the purpose and format of the probation procedure
- set objectives and targets and agree personal development objectives, ensure formal reviews are conducted at the appropriate time and completed in BlueSky as well as a confirmation email sent to HR
- ensure completion of school induction and training activities
- have regular 1:1 meetings, provide feedback indicating how well you are performing and provide constructive criticism where appropriate
- monitor performance, attendance, absence, timekeeping and any other factors relevant to effective performance
- assign a mentor as appropriate
- raise areas of concern with Human Resources at the earliest opportunity
- provide Human Resources with a recommendation for confirmation of appointment at the end of the review period, or discuss arrangements for an extension or termination (see para 2.14 for options relating to internal promotion)
- set objectives to cover the remainder of the review year at the end of probation and as part of the performance management process

3.3 The role of the Head of Department - It is the responsibility of the Head of Department to ensure the probation policy and process is consistently and correctly applied and to review the final probation outcome in BlueSky

3.4 The role of Human Resources: The HR team will:

- monitor the operation of the probation process
- confirm appointments following satisfactory completion of the probationary period
- provide advice and training to managers and staff as appropriate
- arrange and attend dismissal meetings
- regularly review and update the policy

4. Raising Awareness of this Policy

We will raise awareness of this policy via:

- the School Bus Compliance Manager
- the Staff Handbook
- meetings with school staff

5. Equality Impact Assessment

Under the Equality Act 2010 we have a duty not to discriminate against people on the basis of their age, disability, gender reassignment, marriage and civil partnership, pregnancy or maternity, race, religion or belief, sex and sexual orientation.

This policy has been equality impact assessed and we believe that it is in line with the Equality Act 2010 as it is fair, it does not prioritise or disadvantage any person and it helps to promote equality at this school.

6. Monitoring the effectiveness of the policy

This policy and procedure will be reviewed every two years.

Management of policy

The Headteacher has overall responsibility for the maintenance and operation of this policy.

The Local Governing Board approved this policy on date: 3rd July 2025

Signed: Colin Hayfield, Chair of Governors

Signed: Helen Hannam, Headteacher

Date of review or revision	Description	Author or reviewing officer
June 2025	Arbor replaced by Blue Sky	Anna Weir