

SUPPORT STAFF PROBATIONARY PERIOD POLICY



Agreed: December 2020

Reviewed: May 2022

Next Review: May 2025

Member of Staff's Name:

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Department:

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Line Manager / Appraiser:

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1. Policy Statement

The Federation is committed to providing a smooth and supportive working environment. It is the Federation's policy to require all new members of support staff to undertake a period of probation when they commence employment.

The probationary period is six months and operates in conjunction with the induction and initial training offered to new employees. The School holidays are not included within the probationary period unless the employee is contracted to 52 weeks.

This policy is intended to allow both the employee and the Appraiser / Line Manager to assess objectively whether the individual is suitable for the role. This includes, and is not restricted to: attendance, performance, conduct and satisfactory pre-employment checks, Concerns will be addressed at an early stage with support measures put in place.

Should the required improvements not be made the probationary period may be extended or if performance remains unsatisfactory termination of employment may be considered. Should an employee's performance and conduct be satisfactory their employment will be confirmed in writing.

2. Purpose

This policy is intended to support and guide staff and enable managers to manage employee performance and conduct in a way which is fair and consistent. The Employee's performance will be monitored and supported by their Appraiser and/or Line Manager. The employee is expected to fully contribute to the process. During this period the employee should be able to:

- Understand the school and their own role and how these fit together
- Understand the expectations, standards, behaviours and job tasks required for their role and how to fulfil these
- Reach a level of performance in a number of skills which are satisfactory to the school.

3. Scope

This procedure applies to all permanent and fixed term support staff in the Federation. Employees with prior service in other schools, maintained schools and other local government employers will be required to undertake a probationary period with the Federation.

4. Terms of Employment

During the probationary period, employees will be subject to all the terms and conditions of their contracts of employment. All staff that are within a probationary period will not be entitled to a salary increment until they have successfully completed their probation.

5. Responsibilities

The Executive Principal / Head of School has overall responsibility for the internal organisation, control and management of the policy. The Executive Principal / Head of School can delegate responsibilities to another member of staff. The members of the Senior Leadership Team have responsibility for the internal organisation, control and management of their area or responsibility.

Under this policy the Appraiser / Line Manager has delegated responsibility for conducting/reviewing and monitoring the new Employee's performance and progress during the probationary period and making recommendations.

6. Confidentiality

Information about performance and conduct will be handled carefully and in accordance with the Data Protection Act 1998 to ensure sensitive details remain confidential.

7. Equal Opportunities

The Probationary procedure must be applied fairly and in accordance with employment law and the Federation's Equal Opportunities Policy.

Part 2 – Procedure

8. Structured Probationary Review Meetings

During the six month probationary period, three formal meetings between the Employee and Appraiser / Line Manager should take place to discuss the employee's progress.

Meeting 1: Within First Two weeks of Employment

Soon after an employee commences in the role, the line manager should formally meet with the employee and set standards of performance and conduct required using the skill checklist in Appendix 1. This involves identifying any skills that are not yet being achieved and identify any training needs. They should also ensure the completion of the checklist under the induction policy. **A copy of the checklist should be shared with the employee.**

Meeting 2: Three month Employment Assessment

This meeting is half way through the probationary period and therefore a good opportunity to a review progress and make future objectives. They should complete the second column using the skill checklist in Appendix 1. This involves identifying any skills that are not yet being achieved and identify any training needs. **A copy of the checklist should be shared with the employee.**

Meeting 3: Five Month Employment Assessment

This meeting is towards the end of the probationary period and as such could be the final review to consider the overall performance during the first 6 months of employment. They should complete the third column using the skill checklist in Appendix 1. **A copy of the checklist should be shared with the employee.**

Regular informal meetings between the line manager and employee are encouraged. The Employee should reflect on their own performance and raise any concerns. The Line Manager / Appraiser should make note of all meetings and agreed actions and copies of formal review

meetings to be forwarded to the Personnel Manager so they can be placed in the employee personnel file.

9. Confirming a Successful Probation Period

Towards the end of the probationary period the final review meeting is to consider the overall performance. Should the employee's performance be deemed as satisfactory, successful completion of their probationary period will be confirmed in writing.

10. Concerns during the Probationary Period

Where concerns become apparent they will be raised at the earliest opportunity with the aim of supporting the employee to improve their performance or conduct. The employee should be made aware that should the required improvements not be made their employment may be terminated. The Line Manager / Appraiser will seek advice from Personnel Manager and refer to the Head of School / Executive Principal.

The evidence for missing skills and any training requirements must be documented in Appendix 1.

11. Extending the Probationary Period

The maximum extension of probation period is up to a further 3 months, to further enable the employee to attain the required standard. The employee should be made aware that if the required improvements are not met their employment may be terminated. Towards the end of the extension a final review meeting will take place. Should performance be deemed satisfactory the employee will receive written confirmation of the successful completion of their probationary period.

In exceptional circumstances where the school was closed or the employee is unable to attend for a significant period of time and, therefore, are unable to make an appropriate assessment of the employee's suitability, the Federation reserve the right to add a further extension to the probationary period to cover the time missed.

Where probation has been extended a salary increment will not be awarded. Confirmation of satisfactory probation period is also subject to a complete Appendix 1 form submitted to the Personnel Manager for the personnel file.

12. Terminating Employment during the Probationary Period

To give the employee the fullest opportunity to meet the required standard the Federation's policy is to allow the employee to complete the designated period of probation. If there is clear evidence or information that comes to light that may be so serious as to call into question the employee's suitability for the role, the Federation may convene a hearing and terminate the employment prior to the end of the probation period. Suspension may be considered pending investigation.

The employee will be invited to attend a probationary hearing. The outcome of the hearing will be confirmed in writing to the employee within a reasonable timeframe.

Part 3 – Employee Rights

13. Right of Appeal

An employee may appeal against a decision to dismiss. The employee must set out the grounds of their appeal, in writing, to the Personnel Manager within five working days of receiving the written confirmation of dismissal. The appeal will be heard by a panel of the Tonbridge Federation Governing Body. The decision of this panel is final and there is no further right of appeal. A letter confirming the decision will be sent to the employee within a reasonable timeframe.

14. Right of Representation

An employee has the right to be accompanied by a Trade Union representative or workplace colleague at any formal meeting. If the employee's workplace colleague or Trade Union representative is unavailable to attend the meeting, the meeting can be deferred by up to five working days from the date of the original meeting.

Should the employee fail to attend, without sufficient reason, or fail to appoint a representative in their absence, a decision will be made based on the evidence available at the time. The employee can provide a written support statement to the panel and send their trade union/professional association representative or work colleague on their behalf. The Chair of the panel should confirm the decision in writing

15. Record Keeping

Notes will be taken at the hearing and appeal meeting and shared with the employee to check and comment on the accuracy of the minutes.

Appendix 1 - TONBRIDGE FEDERATION PROBATIONARY PERIOD CHECKLIST

STAFF MEMBER NAME	
LINE MANAGER	
DATE OF PROBATIONARY PERIOD START	
DATE PROBATIONARY PERIOD END	

Please tick the following areas where you have observed evidence (please write N/A where these skills are not related to the post):

SKILLS	ASSESSMENT AREA	2 WEEK REVIEW	3 MONTH REVIEW	5 MONTH REVIEW
Essential skills	Good attendance			
	Punctual			
	No safeguarding concerns			
	Supportive of equal opportunities			
Communication skills	Speaking so understood			
	Listening to others			
	Positive body language			
	Use of technology (where appropriate)			
Interpersonal skills	Good work ethic			
	Self-confident			
	Receptiveness to feedback			
	Positive attitude			
	Appearance			
	Conscientious			
Team work	Empathy for others			
	Managing relationships			
	Collaboration (working together)			
	Conflict management			
Job related skills	Co-operation with peers and leaders			
	Knowledge and understanding of the role			
	Being proactive			
	Being organised to work effectively			
	Planning tasks			
	Time management			
	Flexibility to different situations			
	Problem solving			
Decision making				
Managing pressure				

Skills requiring further focus on after 2 weeks	
Training needs	

Skills to focus on after 3 months	
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Training needs	
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Any outstanding skills at the end of the 5 month probationary period	
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Please note - The line manager must consider any reasonable adjustments in line with the Equality Act 2010.

End of probationary period recommendations		
Successful	Not successful	Recommend a further extension

Line manager / appraiser signature _____

Employee signature _____

Date of final meeting _____

Please return appendix 1 form to the Personnel Manager once probationary period completed