



The Athelstan Trust

Probationary Period Policy

Date of Review	Approved by	Date of Approval	Next Review Date	Website
March 2022, March 2024, Sept 2025, June 2026	Staffing Committee	17 th June 2026	October 2028	Y

Introduction

It is the Trust's policy to operate probationary periods for all new staff employees.

This policy is intended to allow both the employee and the Trust to assess objectively whether or not the employee is suitable for the role. The Trust believes that the use of probationary periods increases the likelihood that new employees will perform effectively in their employment and provides a process for supporting staff in their new role.

The line manager is responsible under this policy for ensuring that all new staff employees are properly monitored and supported during their probationary period. If any problems arise, the line manager must address these promptly. This will ensure that the employee is aware that some aspect of their performance or conduct is unsatisfactory and prevent the problem from escalating.

Annual appraisals (including target setting) for teaching staff take place before 31st October each year, and for Support Staff before by the end of term 4. To accommodate this annual cycle of target setting, an appraisal may therefore be completed for an employee during their probationary period.

Early Career Teachers

In the case of Early Career Teachers (ECTs) their regular mentoring and reporting of their progress to the school's induction tutor and the Appropriate Body (AB) will take the place of the probationary review meetings. A permanent contract for ECTs is subject to satisfactory completion of the ECT two year induction period.

Length of probation

The Trust's standard period of probation is four months.

Extending probationary periods

The Trust reserves the right to extend an employee's period of probation at its discretion. This will be limited to one extension of up to 6 weeks: the total period of probation **must** be no longer than 6 months. The extension may be implemented at any stage of the probation period.

An extension may be implemented in circumstances where the employee's performance during probation has not been entirely satisfactory, but it is thought likely that an extension to the probationary period may lead to an improvement, or where the employee has been absent from the workplace for an extended period during probation which the Trust believes has prevented adequate monitoring during probation

Before extending an employee's probationary period, the line manager must consult with the member of staff responsible for HR in the school. If an extension to the probationary period is agreed, the Trust will confirm the terms of the extension in writing to the employee, including:

- the length of the extension and the date on which the extended period of probation will end;
- the reason for the extension and, if the reason is unsatisfactory performance, details of how and why performance has fallen short of the required standards;
- the performance standards or objectives that the employee is required to achieve by the end of the extended period of probation;



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- any support, for example further training, that will be provided during the extended period of probation; and
- a statement that, if the employee does not meet fully the required standards by the end of the extended period of probation, their employment will be terminated.

Line managers' responsibilities

Under this policy, the line manager has responsibility for monitoring a new employee's performance and progress during the probationary period. The line manager must ensure that the employee is properly informed at the start of their employment about what is expected of them during probation, for example the required job outputs or standards of performance and expectations in terms of conduct.

Reviews during probation

The line manager must review and assess the employee's conduct, performance, capability and suitability for the role at 6, 12 and 16 weeks during the employee's probation, and again at the end of the probationary period. If the 16th week of employment (and therefore final review meeting) is due to fall during the summer break, the meeting must be brought forward to ensure it is held before the start of the holiday (see Appendix 2 for examples of start dates and review dates). A clear record must be made of each review meeting. Following each meeting, a copy of the record (see appendix 1) must be passed to the employee and the original forwarded to the member of staff responsible for HR in the school.

During an employee's probation, the line manager must provide regular feedback to the employee about their performance and progress, and, should there be any problem areas, raise these with the employee as soon as possible with a view to resolving them. It should be noted that the Athelstan Trust Staff Code of Conduct always applies, and any urgent issues regarding conduct must be addressed immediately, and not delayed until a probationary review meeting. The line manager is also responsible for providing guidance and support and for identifying and arranging any necessary training or coaching.

Irregularities discovered during the probationary period

If, during an employee's probation, it is suspected or established that the employee does not have the qualifications, experience or knowledge that they claimed to have at the time of recruitment, the matter will be discussed with the employee to establish the facts. If the evidence suggests that the employee misrepresented their abilities in any way, the Trust will terminate the employment giving one week's pay in lieu of notice.

End of probation

At the end of the probationary period, the line manager must conduct a final review of the employee's conduct, performance and suitability for the job. This will involve a meeting with the employee to discuss their performance and progress throughout the period of probation. The review must be conducted on or shortly before the date on which the employee's probationary period comes to an end. If the employee's performance is satisfactory, the line manager must notify the member of staff responsible for HR in the school and forward the completed form. The member of staff responsible for HR in the school must then issue a letter of confirmation of appointment to the employee.

If the employee's performance has not met the standards required by the Trust, the line manager must discuss the matter with the member of staff responsible for HR in the school before any decision is made to terminate the employee's employment. The employee will be informed that they have not passed their probationary periods.

If the employee does not receive written confirmation that they have successfully completed their probationary period, they should assume that their role will continue.



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Termination of employment

If an employee's conduct or performance while on probation has been unsatisfactory (despite support from the line manager), and it is thought unlikely that further training or support would lead to a satisfactory level of improvement, the employment will be terminated at the end of the period of probation.

It is generally the Trust's policy to allow the employee to complete the designated period of probation rather than terminating employment before the probation has come to an end. This is to give the employee a full opportunity to come up to the required standards. If, however, there is clear evidence prior to the end of the period of probation that suggests the employee is wholly unsuitable for the role, the line manager must consult the HR advisor with a view to terminating the employee's contract early.

Where a decision is taken to terminate the employee's employment, the employee must be interviewed and informed of the reason for the termination. The Trust will write to the employee confirming the termination and the reason for it. The employee will be given an opportunity to appeal the decision.



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PROBATIONARY RECORD

Appendix 1

The Athelstan Trust Probationary Period Review Form

This form must be completed by the new employee's line manager to record the discussion and assessment of an employee's performance and progress during their probationary period. A review must be conducted at 6, 12 and 16 weeks. A copy of this record must be provided to the employee, and the original sent to the member of staff responsible for HR in the school.

Employee Details	
Employee name	
Job title	
Start date	
Probation start date (if different to above)	
Original probation end date [four months] or as per contract	
Current probation end date (if extended)	
Date of this review	

Review type	Tick	Notes
6 week / 12 weeks / 16 week review		
Final probationary review		
Other (specify)		

Expectations communicated at start of employment (to be completed at first probationary review):

As per the policy, employees must be informed at the start of their employment about what is expected during probation, including required job outputs, standards of performance, and expectations in terms of conduct. Please confirm that has been done and what induction training has been completed. Briefly summarise or attach relevant documentation if applicable (e.g. has the induction checklist been completed?).

Assessment of performance, conduct, capability, and suitability:

(Based on observation, feedback, and discussions. Provide specific examples where possible.)

	Excellent	Good	Fair	Improvement required
Quality of work				
Quantity of work				
Dedication to the job				
Ability to work without supervision				
Working relationships				



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Feedback provided during review period:

(Summarise the regular feedback provided to the employee since the last review or start date, including any problem areas raised and discussed.)

Have there been any periods of absence:

(If applicable, please document number of days of absence and reasons. Has this had an impact on the line manager's ability to review progress during probation?)

Have there been any issues with timekeeping:

Support, guidance, and training provided:

(Detail any support, guidance, coaching, or training identified or arranged to help the employee meet expectations.)

What is the employee's feedback on the job and the training received:

Progress and overall assessment for this period:

(Summarise the employee's overall progress and suitability for the role during the period covered by this review.)

Objectives/required standards for next period (or remainder of probation):

(Clearly state the key objectives, performance standards, or areas the employee needs to focus on and achieve by the next review or the end of probation.)

Line manager's recommendation (for final review only):



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Appendix 2

The table below gives an indication of key start dates, review dates and probationary completion dates.

Start Date	Latest Probationary Completion Date	Notes on Review dates
1 st September	1 st March	16-week review may take place just before or just after the Christmas Break. Latest date for 16-week review: 15 th January.
1 st January	1 st July	16-week review to take place by mid-May.
1 st March	1 st September	16-week review must take place by mid-June to allow for an extension (if required) to be completed before the summer break.
1 st April	1 st October	16-week review must take place at least 2 weeks before the summer break to allow for an extension (if required) to be completed before 1 st October.