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independence together

Probation Policy and Procedure

Reviewed Annually

Non-Statutory

Signed:  (Chair of the Trust)

Date of last review: July 2026

Review Due: July 2027

1. Policy

- 1.1 The Trust is committed to attracting, developing and retaining a skilled, flexible and high-performing workforce dedicated to delivering high-quality education and support services. This policy provides a fair, consistent and supportive framework for assessing employees during their probationary period.

2. Scope

- 2.1 This policy applies to all newly appointed employees within the Trust, including teaching and support staff. It may also apply, at the Trust's discretion, to employees who move into a new role within the Trust or return following a significant break in service. Early Career Teachers (ECTs) are subject to their statutory induction period; however, concerns relating to conduct, attendance or suitability may be addressed under this procedure where appropriate.

3. Principles

- 3.1 The Trust is committed to managing probation in a fair, supportive and transparent manner. The probationary period is intended to both assess performance and provide employees with the opportunity to succeed through appropriate guidance and support.
- 3.2 Managers will address concerns relating to performance, conduct or attendance promptly and will not delay discussions until formal review meetings. Employees will be informed of any concerns, given clear expectations, and provided with reasonable support and opportunity to improve.
- 3.3 The Trust will ensure consistency and fairness in all decisions and will consider reasonable adjustments where required under the Equality Act 2010.
- 3.4 Where required standards are not met, outcomes may include an extension of the probationary period or termination of employment.

4. Purpose and Length

- 4.1 All employees will serve a probationary period of three months (12 weeks). During this period, performance, conduct, attendance and overall suitability for the role will be assessed.
- 4.2 The probationary requirement will be confirmed in the employee's contract of employment and continued employment is subject to satisfactory completion.
- 4.3 Formal review meetings will normally take place at the mid-point of the probationary period (approximately 6 weeks) and prior to its conclusion (approximately 10 weeks).

5. Procedure

5.1 Probationary Review Meetings

The assessment of an employee on probation is a continuous process. Employees will receive continuous feedback, supported by formal review meetings at 6 weeks and 10 weeks. The notes of the meeting will be confirmed in writing, placed on the individual's personnel file and shared with the employee.

Review meetings will assess performance, identify areas for improvement, and agree clear and measurable targets, support, and review arrangements.

Outcomes of all meetings will be confirmed in writing and retained on the employee's personnel file.

Concerns must be raised promptly as they arise and not held back until formal review points.

Where an employee has a disability, reasonable adjustments will be considered and implemented in line with the Equality Act 2010.

Informal support and feedback will be provided throughout the probationary period to help employees meet expected standards.

5.2 Extension to Probationary Period

In most cases, it would be expected that the employee would be confirmed in their appointment within the relevant probationary period. However, there may be occasions that arise where an employee has not reached the appropriate standard at the end of that time, but it is identified that an extension of the probationary period may result in any

identified problems being overcome.

Headteachers/Managers have discretion, with the support of their Human Resources Adviser, to extend a period of probation. The extension of probation will be confirmed in writing to the employee. It should be noted that a manager does not have to wait for the 3 months before recommending an extension to the probationary period.

When recommending extending probation managers should ensure that they give reasons for the extension, for example; 'not yet at standard required but expected to be able to reach the standard within extended period'; or 'absences of employee resulting in an inability to adequately assess performance during the initial probationary period'; or 'a training need identified that has yet to be delivered' and set out the terms of the extension clearly, including the potential outcome if the performance fails to reach the standards required.

Where appropriate, the probationary period may be extended, normally for up to 6 weeks.

Any decisions made at the probationary meeting should be recorded and monitored by the manager concerned.

5.3 Successful Completion of Probationary Period

Employees who meet the required standards will receive written confirmation of successful completion of their probationary period.

5.4 Final Review Meeting

Where concerns remain, a Final Review Meeting will be convened.

The employee will be given at least 5 working days' written notice and informed that dismissal is a possible outcome. The employee has the right to be accompanied by a trade union representative or work colleague. At the meeting, performance and support provided will be reviewed, and the employee will be given the opportunity to respond before a decision is made.

The outcome will normally be confirmed in writing within 5–10 working days, including details of the right to appeal.

The decision-maker will ensure that all relevant information has been considered before reaching a decision.

5.5 Appeals Process



The appeal will be heard by a panel of Trustees/Governors not previously involved in the case.

An employee may appeal against any decision to dismiss under this probationary procedure. The Appeal should be lodged in writing with the Chair of Governors within five working days of receipt by the employee of the letter notifying the employee of their dismissal. The letter should clearly set out the grounds of appeal.

The Appeals panel will normally be made up of a panel of at least two Members of the Local Advisory Board/Trustees, but will not include staff Governors. The hearing will be arranged as soon as possible after receipt of the appeal letter. The employee will be given at least 5 working days' notice of any appeal meeting and they will have the right to be accompanied by a trade union representative or work colleague. Relevant documentation will be circulated in advance wherever possible.

The Appeal Panel may either make a decision at the end of the meeting or adjourn and confirm the decision at a later date. Where possible, any decision will be confirmed in writing within 10 working days of the meeting.

There is no further right of appeal after this.

5.6 Safeguarding/Misconduct

In cases involving safeguarding concerns or allegations of serious misconduct, the Trust reserves the right to manage the matter under the disciplinary procedure rather than the probationary process.

6. Monitoring and review

- 6.1 The Trust will review this procedure regularly to ensure compliance with employment law and alignment with best practice.

- 6.2 The application of this procedure will be monitored by HR to ensure fairness and consistency. Data may be analysed in relation to protected characteristics under the Equality Act 2010.
- 6.3 ~~Such reports will be made available to recognised trade unions.~~