

Learning Accord Multi Academy Trust

Probationary Policy



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Name of Policy Writer	LAMAT
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Introduction

All support staff employees who are new to Learning Accord Multi Academy Trust need to complete a probationary monitoring period before being confirmed in post. This is normally 6 months from appointment.

This policy applies to all new support staff regardless of previous local government service, or whether the appointment is substantive or fixed term.

It provides an opportunity to ensure all new employees of Learning Accord Multi Academy Trust can be properly supported whilst at the same time having opportunities and assessments to demonstrate the performance and behaviour meet the necessary standard before their appointment is confirmed.

Probationary Period

The probationary period should be a supportive process and include measures to help new employees to succeed. It enables any problems to be highlighted and action taken to resolve any difficulties. The Headteacher/Line Manager is expected to set clear and attainable targets for the employee to achieve, which will match the job specification, link with Academy policies and describe the behaviours and outcomes expected. Support may include mentoring, training, coaching and guidance as well as on the job experience.

Processes and Timescales

During the probationary period, school managers will induct the employee, set clear targets and support employees to demonstrate that their performance and behaviour meets the required standard. The probationary period itself is usually not less than 6 months, to enable a proper assessment to be made. This may be extended in exceptional circumstances to nine months (if, for example, the new employee has been absent from work through ill health or if further assessment is necessary before confirming the employee in post). If the employee transfers to another role during their probationary period, the probationary period may continue in their new role and may be extended to account for assessment of the new duties.

What is involved

The probationary period includes meetings for reviews of performance and behaviour, to be undertaken by the Headteacher / Manager, which will determine if appointments should be confirmed. Ultimately, if an employee's probationary period is not considered successful their appointment will be terminated.

Guidance for Headteachers and Managers

Introduction

In order to help new employees to succeed, the information outlined below is provided to enable effective management and support of employees during their probationary period. Guidance is also provided in relation to dealing with support staff employees who are not able to demonstrate they can meet the required standards of performance. The policy does not apply to teachers as they are subject to the 'Teacher Pay and Conditions Service'.

Step 1 - Induction

The induction process is an important step in effective probationary monitoring and will usually last around 6 weeks.

- 1) Welcome the new employee and make their first experiences positive.
- 2) Think about what support can be given to help them to quickly settle into their new role.
- 3) Provide the new employee with relevant information to help them settle in and understand what is required of them.

The induction period will include:

- Meeting other colleagues
- Providing information, guidance or training
- Shadowing colleagues and on the job training.
- Ensuring they have received information linked to working hours, attendance management, conduct, behaviours, health and safety and data protection requirements.
- Access to the Academy Staff Handbook and how to access Academy policies and procedures.
- Ensuring they know who to go to for additional support.
- Ensuring they know how to access further information

Step 2 - Targets and performance expectations

Whilst the new employee is being inducted, it is essential to provide clear guidance about expected levels of performance and to set reasonable and achievable targets. These will be linked to the specific requirements of the role as set out in the job specification, but will also include overall school objectives and key behaviours.

- 1) Consider expectations for the employee at 6 weeks, 3 months and 6 months
- 2) Outline the support that will be put in place.
- 3) Explain the monitoring arrangements to review progress through the probationary period.
- 4) Keep monitoring records to confirm the targets identified, support provided and discussions that take place with the new employee. The Probationary Monitoring Form may be used for this process.
- 5) If there are any disciplinary issues these must be dealt with these as they arise.

- 6) Make sure that the employee realises that such issues could lead to an earlier decision being made about their employment with the Academy.

Step 3 – Probationary Monitoring

At the end of the employee's induction period a meeting should be arranged to confirm the key targets, behaviours and performance expectations that will be used for the rest of their probationary monitoring period.

Meet with the employee on a regular basis to ensure their progress is being assessed and the appropriate support and training is identified.

Probationary Review Meeting:

The purpose of the Probationary Review meeting at 3 months is to consider how the employee is performing. This is usually a meeting with the line manager and the employee without any HR or Trade Union involvement.

- 1) The review should take place in a quiet place and where colleagues will not be interrupted.
- 2) Any areas of identified concern should be discussed and further support identified and put in place.
- 3) Keep a written record of the key areas discussed, including any comments from the employee.
- 4) Provide the employee with a copy.
- 5) Check that the new employee understands whether they are doing well or whether there are still areas they need to focus on. The Probationary Monitoring Form can be used for this process.

Step 4 – Final Probationary Review Meeting.

Just before 6 months service is completed a Final Probationary Review meeting should be conducted. This does not usually include HR or Trade Unions.

- 1) Carry out a final review of performance
- 2) Decide whether the employee has reached the required standards of both performance and behaviour.
- 3) Keep a written record of the key points discussed including comments from the employee.
- 4) Complete the Final Probationary Report Form.

If all goes well - what happens next?

In most cases appointments are confirmed. Arrange for a letter to be sent to confirm the success of the employee's probationary period and ensure the outcome is placed on the employee's personnel file.

After the process has been completed it may be helpful to think about any lessons learned so that these can improve future recruitment, induction and probationary processes.

What if it's not going well?

Throughout the probationary period there should be regular discussions with the employee. It is important to obtain feedback on the employee's performance and behaviour. Any concerns should be raised with the employee as they arise.

It's important not to forget to take account of factors such as disability or personal circumstances which might affect an employee's performance. If the employee has a disability which might be making their work more difficult, discuss with them whether a reasonable adjustment could be made or whether any equipment could be provided. Work/life balance issues may also be discussed. HR may be contacted for further advice. The CEO of Learning Accord Multi Academy Trust must be alerted where there are serious concerns which may lead to termination of employment.

If there are fundamental concerns about the progress the employee is making and the Final Probationary Review Meeting is some time off consider bringing forward the Final Probationary Review meeting. You should discuss this with HR as this action should only be taken in exceptional cases.

Where there are concerns about an employee's performance which means you are unable to confirm their appointment, a Final Probationary Review meeting must be arranged. The Headteacher should then obtain from the Local Governing Body delegated authority to dismiss. The employee must be notified of the arrangements for the meeting in writing and be advised of the possible outcomes which may be an extension of the probationary period or termination of employment. The employee must be reminded that due to the potential seriousness of this meeting they are able to bring a trade union representative or work colleague with them. It may be appropriate for Headteachers to also seek HR support for the meeting.

At the final probationary meeting Headteachers/line managers must refer to the probationary period documentation to review the targets that have been set and areas which indicate the employee has failed to reach the required standards.

It is essential that the necessary support to help the employee successfully complete the Probationary Period has been recorded clearly along with the impact that their underperformance is having.

Extending the probationary period

It is possible to extend the probationary period in exceptional circumstances; the maximum extension would be 3 months. An extension should only be used where it is genuinely believed that the employee can achieve the standards required. If the Headteacher/line manager is confident that the employee needs more time to successfully complete the Probationary Period, the employee may be informed of the extension and any further targets for improvements. Progress must be monitored closely during the extension period.

Appeal Processes

If an employee is not satisfied with a decision to extend their probationary period they may request a review. The request may be made in writing to the Chair of Governors explaining why the employee is unhappy with the decision. The review will normally be conducted within 15 working days of the decision being communicated to the employee at the meeting. The decision of the Chair of Governors is final.

When standards cannot be achieved

Where it is judged that the required standards cannot be achieved the employee should not be confirmed in post and their employment terminated. Prior to doing this HR should be contacted for further support and the CEO notified. This decision to terminate employment must be confirmed in writing and HD One Payroll informed. The employee is not asked to return to work or work their notice period, but a payment in lieu of notice should be paid instead.

Employee Appeal

The outcome letter should confirm the right of appeal and timescales for this, which is normally 15 days from receipt. All appeals will normally be heard by a Governors Appeal's Panel.

What happens at an appeal?

At an Appeal hearing, the Headteacher/line manager will be expected to present management's case and show all the documentation with the targets set, support given and concerns which demonstrate the employee has failed to reach the required standard.

NB: In most cases probationary periods go well, and the process supports clear understanding about targets and expectations, enables regular communication, feedback and support to be put in place to enable new employees to work successfully.

See Appendix 1 - Probationary Monitoring Form - Blank Version

The Probationary Monitoring form should be used at each review point - 6 weeks, 3 months and 6 months, or more frequently where there are concerns.

The Job Specification should be used to pre-populate the Performance Area and Standards Expected columns so that objective judgments can be made in line with the required standards.

See Appendix 2 - Probationary Monitoring Form - Example with completed performance and standards Section

Appendix 1- Probationary Monitoring Form-Blank Version

Probationary Monitoring Form				
Employee Name		Job Title	Support Officer	
Manager's Name		Job Title		
Start Date		Date of Discussion		Date of Next Review Meeting
<p>Probationary monitoring is to support you to understand the key targets, behaviours and performance expectations that will you will need to demonstrate to show that performing your new role effectively. This form will be used to help clarify expectation and to show you how you will be supported and how your progress will be monitored. You will be provided with a copy of this form so that clear about how your performance will be assessed.</p>				
PERFORMANCE AREA	STANDARDS EXPECTED <i>What effective performance might look like</i>	CURRENT ASSESSMENT	TARGETS	ACTION DECIDED
Take from Job specification	Take from Job specification			
	Insert rows as needed			
ADDITIONAL COMMENTS				
<p>Are there any issues/ concerns that should be considered EG. How is the Employee in general?</p> <p>Are there any personal issues or issues within the Academy/ Trust/ Team that impact on the Employee?</p>		Any Support / Action Required		

Appendix 2- Probationary Monitoring Form-Example Completed Performance & Standards

Probationary Monitoring Form				
Employee Name		Job Title	Support Officer	
Manager's Name		Job Title		
Start Date		Date of Discussion		Date of Next Review Meeting
<p>Probationary monitoring is to support you to understand the key targets, behaviours and performance expectations that will you will need to demonstrate to show that performing your new role effectively. This form will be used to help clarify expectation and to show you how you will be supported and how your progress will be monitored. You will be provided with a copy of this form so that clear about how your performance will be assessed.</p>				
PERFORMANCE AREA	STANDARDS EXPECTED <i>What effective performance might look like</i>	CURRENT ASSESSMENT	TARGETS	ACTION DECIDED
Business Support Officer:	<ul style="list-style-type: none"> • Able to competently use the information systems relevant to role, Word, Excel. • Maintains relevant information systems, producing information as required. • Produces accurate work which comply to service standards/ expectations • Ability to organise workload and pro-actively plan to meet demands of the role. • Follows expectations for security of assets and information. • Can meet demands of workload with expected levels of supervision and support. • Contributes to team discussion and supporting service improvements. • Able to provide support and guidance to new and less experienced members of staff on work practices and service expectations. . • You identify any problems so that appropriate action can be taken. • You comply with procedures, risk assessments and work in ways to minimise risk. 			
Knowledge and Technical competencies	<ul style="list-style-type: none"> • Understands procedures, applying them correctly. • Refers to training manual/s and supporting notes and where appropriate seeks advice when unsure. Able to maintain information systems independently and accurately • Assists with the management of health and safety. 			

Appendix 2- Probationary Monitoring Form-Example Completed Performance & Standards

Guidance and Support to others	<ul style="list-style-type: none"> You can provide training and guidance to teams or individuals. Support others to ensure they understand and complete records and management information, such as timesheets, accident books or maintain In-Cab devices. You act as a good role model. 			
Customer Focus / Interpersonal Skills Working with Others:	<ul style="list-style-type: none"> You are helpful, polite and courteous to colleagues, councillors and customers. Relates well with colleagues and contributes to team discussions Provides customers with information and support to resolve problems. You deal with conflict situations appropriately. 			
Communication Skills:	<ul style="list-style-type: none"> You communicate messages to and from the team. You provide guidance to others to use tools, operate equipment and to understand expected working arrangements. 			
Behaviours:	<ul style="list-style-type: none"> You demonstrates council Behaviours – level 1 Honest: Respectful: Positive: Communicative: Flexible: Supportive: 			
Attendance & Timekeeping:	<ul style="list-style-type: none"> Follows procedures for requesting and reporting absence No instances of unjustified or unexplained lateness Adheres to scheduled breaks & lunches Considers wider team and takes this into account for managing absence and supporting service delivery. 			
ADDITIONAL COMMENTS				
<p>Are there any issues/ concerns that should be considered EG. How is the Employee in general?</p> <p>Are there any personal issues or issues within the Council/ Directorate/ Team that impact on the Employee?</p>		Any Support / Action Required		