

Policy Title:	Probationary Period Policy
Version:	1.2
Member of Staff Responsible:	Chief Executive Officer
Status:	Non Statutory
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Reviewed:	Bi-annually

Change Record

Version:	Date	Description
1.1	05/02/24	Changes to the following sections – New Entrants, Ongoing Probationary Review meetings, Formal Review Meeting, End of Probationary Period, Termination of the employees' contract of employment Notice Period and Appendix 1 added
1.2	02/02/26	Clarification of colleague and Executive Leader roles. Additional section on Data Protection added
1.3	06/07/2026	Change to probationary period and extension period. Appendix 1 updated.
1.4		

Primitas Learning Partnership promotes the safeguarding and welfare of all children in its care; all policies are developed and formulated with this in mind

Legislative Framework

No specific legislation applies to the subject of Probationary Periods.

Policy Statement

Appropriate Probationary Periods will be applied to all eligible employees as detailed under their contract of employment.

Reference to employees throughout the Policy refers to new staff employed by Primitas Learning Partnership.

Trade Union

When an issue has been identified it is recommended that the employee be advised to contact their trade union representative at the earliest stage so that the union can offer them appropriate advice, guidance and support.

Guidance On How To Apply The Policy

Levels of Authority

Throughout this policy document, there are many references to 'the Line Manager.' For the purposes of this policy, 'Line Manager' is the person or persons with sufficient seniority delegated by the Executive Leader to perform the task(s) required in line with the Trust Scheme of delegation. Within Primitas Learning Partnership Academies the Executive Leader is the Headteacher and within the Central Team, this is the Chief Executive Officer.

Eligibility

This policy applies to all new employees of Primitas Learning Partnership

Provisions

When a new employee enters a post within Primitas Learning Partnership, they will be subject to a probationary period. The purpose of this probationary period is for the employee and Line Manager to review the individual's performance in their new role, provide support and discuss any training needs that they may have. Following the successful completion of the probationary period the employee will be officially confirmed in post.

Prior to the employee commencing with Primitas Learning Partnership, they will receive a Written Statement of Particulars that will state whether or not their contract is subject to a probationary period. Any employee commencing employment at the 1st September 2026 is subject to a 3 month period.

Initial Induction Meeting and Discussion (with the Line Manager)

The Line Manager, as part of the employee's induction, should meet with the employee during the first week of employment. This meeting should cover:

- The Line Managers expectations of the employee in the new role;
- the job requirements linked to their competency in their role and performance, detailing what is expected on a day to day basis as an employee of the Trust. An employee's performance includes their attendance at work, punctuality, reliability and proactive engagement with the probationary review meetings.
- attitudes and behaviours expected to ensure alignment with the culture and ethos of the academy and Trust; the identification of realistic targets and actions arising from the general requirements of the role, linked to their competence and performance as well as special objectives arising from the Academy Development Plan;
- immediate training and development needs in order to deliver the day to day role;
- longer term training and development needs in order to deliver and support strategic objectives in order to agree a plan of action. In addition, the Line Manager and employee will also agree future meetings in order to review the employee's performance and training needs during the probationary period.

Ongoing Probationary Review Meetings (with the employee's Line Manager)

The Line Manager will review, with the employee, their competency, performance and training needs on a regular, informal basis throughout their probationary period as agreed in the initial induction meeting. This will be done in month 1, 2 and 3 with a clear focus on supporting the employee to succeed in their role. These meetings will become more often if problems are encountered.

The meetings will be done through one to one meetings and should cover in line with Appendix 1:

- the employee's progress against tasks/targets;
- discussion of any training received during the period and its effectiveness;
- any issues or concerns that may have arisen with regards to their competence or performance, including concerns about their attendance*, punctuality and reliability;
- revision of existing targets or identification of new targets in line with competence and performance;
- any additional training or support required;
- Attitude and Behaviour.

Notes of the probationary review meetings will be recorded on the Probationary Review Meeting Form. See Appendix 1.

**Attendance concerns would be raised if the employee has high levels of intermittent absence which impacts upon their performance or long-term absence which is not supported by valid, clear, satisfactory or substantiated reasons.*

The detail of the meeting will be recorded fully on the appropriate documentation and signed by the employee and Line Manager. The purpose of these meetings is to ensure that the employee completes their probationary period satisfactorily.

Formal Review Meeting (with the Line Manager)

At any point during the probationary period, a formal review meeting can be called by the Line Manager if there are serious, ongoing concerns with the employee's competence, behaviour or performance. The employee will be written to by the Line Manager informing them of the purpose of the meeting and their right to be accompanied at the meeting by a Trade Union Representative or colleague (a member of staff employed by Primitas Learning Partnership). This meeting will have a sharp focus on exploring the extent to which the employee is on track to pass the probationary period or whether an extension period may be required. If the problems are sufficiently serious to warrant the employee being at risk of having their probationary period terminated early (i.e before the specified 3 month period) then this needs to be communicated clearly during this meeting, together with the targets which need to be met in order to try and avoid this outcome. During this meeting the employee will be asked to identify barriers affecting their ability to achieve the requisite standards and identify any support they feel would be beneficial. The Line Manager will also identify any further support they feel is necessary.

All employees will receive a letter confirming the outcome of the formal meeting.

For those employees who are in this 'serious risk' category, they must be written to by the Manager, after the formal review meeting, to re-iterate the risk and the action that is required to urgently improve the situation and detail any support mechanisms available to them. This communication must also include the time and date of the next formal review meeting, which will also involve the Executive Leader.

Further Formal Review Meeting.

The employee will receive a letter confirming the time and date of the next formal review meeting and confirming that the employee has the right to be accompanied at this meeting by a Trade Union Representative or a Colleague (a member of staff employed by Primitas Learning Partnership). This meeting will be led by the Executive leader; the Line Manager may be in attendance. The letter will also state that during this meeting the employee's progress towards their targets and potential next steps will be discussed. It must be clearly communicated that the 'next steps' could involve early termination of the probationary period.

End of Probationary Period Meeting

At the end of the 3 months probationary period or the period as determined in the final review meeting, a final review meeting will be held with the employee. Where there is a concern regarding the successful achievement of the probationary period the employee will be written to, to advise of the date and time of the meeting, that they have the right to be accompanied by a Trade Union Representative or Colleague (a member of staff employed by Primitas Learning Partnership) and the meeting will be chaired by the Executive Leader.

At this point the Executive Leader has three options:

i) Confirmation of the employee in post

This should be where the employee has successfully completed and achieved all their probationary targets and milestones. The Executive Leader should be fully confident that the employee is competent to deliver the role and that their performance (including their attendance, punctuality, reliability and engagement in the probationary review process) meets the standards required of an employee of the Academy. Following completion of the form, it should be emailed to the HR Manager who will write to the employee confirming they have successfully completed the probationary period.

ii) Extension of the probationary period

This should be where the employee has:

- had some difficulty in meeting their probationary targets and milestones;
- struggled to show a satisfactory level of competence in their role;
- struggled with their attendance, punctuality, reliability or engagement in the probationary review process;

The Executive Leader should be offering additional support and training and the extension period will be for no longer than a period of 4 working weeks, this should be sufficiently realistic whereby the employee can ideally achieve the expected targets and competencies and levels of performance.

Following completion of the form, it should be emailed to the HR Manager who will write to the employee confirming their probationary period has been extended, the reason for the extension and how long the probationary period has been extended and when the probationary period will conclude.

Following the conclusion of the extension period the Executive Leader has two options:

1. Confirmation of the employee in post

This should be where the employee has successfully completed and achieved all their probationary targets and milestones. The Executive Leader should be fully confident that the employee is competent to deliver the role and that their performance (including their attendance, punctuality, reliability and engagement in the probationary review process) meets the standards required of an employee of the Academy. Following completion of the extended probationary period, the forms should be emailed to the HR Manager who will write to the employee confirming they have successfully completed the probationary period.

2. Termination of the employees' contract of employment

This should be where the employee still has not achieved their probationary targets and milestones. The Executive Leader should be confident that the individual would not be able to maintain the levels of competence and performance in their role that are required by an employee of the Academy, which includes their attendance, punctuality, reliability and proactive engagement in the probationary review process. Following completion of the extended probationary period, the Headteacher must contact the HR Manager. The HR Manager will write to the employee confirming their employment has been terminated due to unsuccessfully completing their extended probationary period.

iii) Termination of the employee's contract of employment

This should be where the employee has not achieved their probationary targets and milestones. The Executive Leader should have addressed the relevant issues during the probationary period and offered sufficient training, support and guidance. The Executive Leader should be confident that the individual would not be able to maintain the level of competence and performance in their role that are required by an employee of the Academy, which includes their

attendance, punctuality, reliability and proactive engagement in the probationary review process.

During all probationary review meetings, the employee will be given the opportunity to put their case forward and any mitigating circumstances which needs consideration prior to a final decision about their performance in the role being made.

Following completion of the extended probationary period, the Headteacher must contact the HR Manager. The HR Manager will write to the employee confirming their employment has been terminated due to unsuccessfully completing their probationary period and detailing their right of appeal.

Annual Leave during Probationary Period

The employee will be allowed to take annual leave during their probationary period. However, during this time they will be required to complete and sign the appropriate documentation and have this authorised by their Manager.

If the employee fails to satisfactorily complete the probationary period, and as a result, have their contract of employment terminated, they will be required to pay back any over-claimed holiday payments received. These payments will be calculated according to the Employment Rights Act 1996.

Notice period

Notice to terminate employment will be given in line with the employee's statement of terms and conditions of employment.

Accountabilities

Employee Accountabilities

- To proactively discuss their role and identify appropriate targets and milestones.
- To actively participate in any training and development programmes identified to assist them to deliver against targets and milestones
- To effectively and efficiently work towards identified targets and milestones and seek assistance and guidance as and when required

Line Manager Accountabilities

- To arrange to meet all new employees within the first week of employment to discuss their new role and identify appropriate targets, milestones and training courses.
- To arrange ongoing, informal, supportive meetings throughout the 3 month probationary period to discuss performance and training issues and to support employees to succeed in their role.
- To set realistic targets and milestones
- To liaise with the appointed Manager to raise any ongoing concerns in a timely manner.
- To be fair, equitable, open and honest in the treatment of all employees.

Executive Leader Accountabilities

- To implement a formal review meeting, in collaboration with the Line Manager, when ongoing concerns are raised during the probationary review process.
- To either confirm, extend or terminate the employee's contract of employment after a final discussion with the employee at an appropriate point of the probationary review period and in a timely manner.
- To be fair, equitable, open and honest in the treatment of all employees.

Further Advice and Information

Further background information on this topic is available on the following Websites: www.acas.org.uk

Data Protection

The organisation will comply with the provisions of the Data Protection Act 2018 and the UK General Data Protection Regulation (UK GDPR). Employee data will be processed by the organisation in accordance with the principles of that legislation, as necessary for the performance of the employee's contract of employment and/or the conduct of the organisation's business. The organisation will ensure that personal information about an employee, including information in personnel files, is securely retained.

PROBATIONARY REVIEW MEETING FORM*(Please ensure that you conduct a probationary meeting at 1month, 2months and 3months)*

Employee Details	
Employee Name	
Position	
Line Manager Name	
Line Manager Position	
Induction Details	
Date of Induction Meeting Completed (Complete Day 1 of Employment)	
Colleague Name Completing Induction (See Induction Policy Appendix A)	
Probation Details	
Probation Start Date	
Probation Period Length	
Probation End Date	
Line Managers Expectations	
Mandatory Training Completed (Cross check with Induction Policy – Appendix A)	
Competency of Skills (Aligned to Job Description)	
Staff Code of Conduct Reviewed - Comments	Yes / No
Other Role-Specific Requirements	
First Probationary Review Meeting - 1 month	
Date of Review Meeting	
Discussion Points (To be Reviewed and Evidenced)	
Attitude and Behaviour	
Timekeeping	
Attendance (In line Attendance Policy) Comments	Yes / No
Display of Understanding the Staff Code of Conduct	
Relationships with Colleagues/Students/Parents (if applicable)	
Attitude to Change	
Accepts Responsibility	

Summary of Discussions			
Summary of Strengths			
Areas for Development			
Actions Agreed			
Sign Off			
Employee Signature		Date	
Line Manager Signature		Date	

Second Probationary Review Meeting - 2 months			
Date of Review Meeting			
Discussion Points (To be Reviewed and Evidenced)			
Attitude and Behaviour			
Timekeeping			
Attendance (In line Attendance Policy) Comments		Yes/No	
Display of Understanding the Staff Code of Conduct			
Relationships with Colleagues/Students/Parents (if applicable)			
Attitude to Change			
Accepts Responsibility			
Summary of Discussions			
Summary of Strengths			
Areas for Development			
Actions Agreed			
Sign Off			
Employee Signature		Date	
Line Manager Signature		Date	

Third Probationary Review Meeting - 3 months			
Date of Review Meeting			
Discussion Points (To be Reviewed and Evidenced)			
Attitude and Behaviour			
Timekeeping			
Attendance (In line Attendance Policy) Comments		Yes/No	
Display of Understanding the Staff Code of Conduct			
Relationships with Colleagues/Students/Parents (if applicable)			
Attitude to Change			
Accepts Responsibility			

Summary of Discussions			
Summary of Strengths			
Areas for Development			
Actions Agreed			
Sign Off			
Employee Signature		Date	
Line Manager Signature		Date	

Final Outcome (End of Probation)		
Employee Confirmed In Post Comments	Yes/No	
Outcome Communicated in Writing	Date	
Completed Probationary Review Meeting Form Submitted to Trust HR	Date	

OR

Probationary Extended (Max 4 Weeks)

Extended Probationary Review Meeting Form			
Date of Review Meeting			
Discussion Points (To be Reviewed and Evidenced)			
Attitude and Behaviour			
Timekeeping			
Attendance (In line Attendance Policy) Comments		Yes/No	
Display of Understanding the Staff Code of Conduct			
Relationships with Colleagues/Students/Parents (if applicable)			
Attitude to Change			
Accepts Responsibility			
Summary of Discussions			
Summary of Strengths			
Areas for Development			
Actions Agreed			
Sign Off			
Employee Signature		Date	
Line Manager Signature		Date	

OR

Employment Terminated (Cross Check Probationary Period Policy - for Process)		
Outcome Communicated in Writing	Date	
Completed Probationary Review Meeting Form Submitted to Trust HR	Date	
Outcome Communicated in Writing	Date	
Completed Probationary Review Meeting Form Submitted to Trust HR	Date	