



# Melcombe Primary School Probation Procedure

Reviewed by: Adam Morris

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## 1. INTRODUCTION

1.1 This procedure applies to all full-time, part-time and temporary employees covered under the provisions of the National Joint Councils for Local Government Services (Green Book).

1.2 This provision includes all new employees irrespective of previous local government service.

1.3 Many of the guidelines contained in this procedure concern good management practice which should be maintained for all employees, not just those serving a probationary period, and can be used in supervising staff on a regular basis.

## **2. PURPOSE**

2.1 The purpose of the probationary period is to allow management an opportunity to assess whether the employee has met the standards of work pertinent to the job. At the commencement of their employment, the employee will be told by her/his line manager of the standards against which the quality of their work will be judged.

2.2 The onus is on the employee to meet the standards of work as set out by management. Management should provide every encouragement and assistance to the new employee in order to help them meet the required standards of work for the job. This will be done in the form of regular supervision, coaching and training, as appropriate.

## **3. MISREPRESENTATION OF SKILLS**

3.1 Where a probationary employee has misrepresented their skills, abilities and qualifications at interview, and they are clearly unable to carry out the duties or requirements associated with the job, and then management must decide whether the employment should continue. A meeting giving at least one week's notice to the employee will be arranged to give the employee an opportunity to make representations. Where the employee is a member of a trade union, the employee shall have the right to be accompanied by a trade union representative; otherwise they may be accompanied by a colleague employed by the authority.

## **4. THE PROBATIONARY PROCESS**

4.1 The probationary report gives management and the employee the chance to confirm whether or not the employee is carrying out his/her duties satisfactorily, by means of an assessment of their standards of work. It is recommended that at least two formal meetings are arranged between the manager and employee as an integral part of the probationary process. These should focus upon a review and feedback of the employee's work standards attained against the selection criteria.

## **5. ESTABLISHED POSTS AND NON-ESTABLISHED (TEMPORARY) CONTRACTS – THE PROBATIONARY PROCEDURE IN PRACTICE**

5.1 The employee's line manager will meet with the employee to complete a formal performance assessment report at 10 weeks' employment. The employee will be given working 5 days' notice in writing of the meeting.

5.2 A further assessment should be made at 17 weeks service, or as appropriate, the date(s) of which should be agreed in advance with the employee.

5.3 Employees will be informed in writing following the 10 and 17 week review meetings. Any concerns identified will be clearly stated in order that the employee is made aware of the required standards. Where it is the view of management that the employee does not reach the required standards of the post at either of these review meetings, management will identify what further support or training is required in order that the employee can attain the required standards relating to the post within the normal probationary period.

5.4. Further formal assessment(s) of performance may be undertaken up to 26 weeks service the date(s) of which should be agreed in advance with the employee to check on standards and identify any further training/support as appropriate. In any case a final decision shall be made at 26 weeks service at a meeting with the employee, the date of which shall be agreed in advance.

5.5. At the end of six months' probation and subject to a satisfactory report by the line manager, full and part-time employees appointed to an established post shall be transferred to the permanent staff.

5.6. At the end of six months' probation and subject to a satisfactory report by the line manager, temporary employees shall be confirmed to the temporary post for the duration of the contract. Where the contract is renewed, the temporary employee shall not be subject to a further period of probation to that particular post.

5.7. Where an established employee gains a position to a different post within the School this will not be subject to a separate period of probation.

## **6. EXTENDED PROBATIONARY PERIOD**

6.1. Where it is viewed that an employee has not attained the required standard of performance within the normal six months, probation may at the discretion of management, be extended for a maximum further six months. During this time regular assessments, the dates of which will be agreed in advance with the employee will be undertaken and performance targets set. The same processes with regard to training and support which applied within the first six months of the probationary period shall apply to the extended probationary period. In any case, at the end of twelve months the employee shall either be confirmed in post or terminated with one month's notice.

## **7. TERMINATION OF EMPLOYMENT DURING A PERIOD OF PROBATION**

7.1. In exceptional circumstances employment may be terminated with two weeks' notice either before or at the 10 weeks' service review where management deem the employee to be unsuitable for the post.

7.2. Following the 17 weeks' service review, where the required standards of the post have not been met, employment shall be terminated with two weeks' notice in accordance with the contract of employment.

7.3. Where the required standard of performance is not attained following the 26 weeks' service review (or during the extended period of probation where appropriate) and it is established that the employee is not suited to the post, service shall be terminated with one month's notice in accordance with the contract of employment.

7.4. In respect of 7.1., 7.2., and 7.3., above, where termination is considered appropriate, the employee will also be informed in the dismissal letter of the reasons for terminating employment. The employee may appeal to the next senior manager within five working days of the date of the dismissal letter. In these circumstances the senior manager will arrange a meeting with the employee (and his/her trade union representative/colleague employed by the authority where required) within three working days of being informed of the appeal where applicable. Non availability of a trade union representative will not be accepted as a reason for delay of the meeting. Reasonable attempts must however be made by management to hold the meeting at a mutually convenient time for both parties within the three-day period where applicable. The meeting will enable management to place before the senior officer the reason for non-confirmation of employment and for the employee to be given the opportunity to state why he/she does not agree with the decision. The senior manager's decision will be final and no further appeal is possible.

## **8. NOTICE PERIOD**

8.1. Where either side wishes to give notice during a probationary period, the following notice period is required:

Up to 17 weeks' service - 2 weeks

18-26 weeks inclusive - 1 month

Extended probation (i.e. up to 1 years' service) - 1 month

### **PROBATIONARY PERIOD FLOWCHART (ESTABLISHED POSTS AND NON-ESTABLISHED CONTRACTS OF 1 YEAR OR MORE).**

**UPON COMMENCEMENT OF EMPLOYMENT:** Upon commencement of service, the line manager will meet with the employee to state clearly the required standards of performance

**ASSESSMENT DATES:** Line manager formally assesses Employee's performance at week 10 and thereafter at weeks 17 and 26 (or as required). Employment may be terminated with two weeks or 1 months' notice where the required standard of performance is not attained during this period.

## **WEEK 10: ASSESSMENT UNDERTAKEN**

Employment may be terminated with two weeks' notice where required standard of performance is not attained and it is established that employee is not suited to the post.

**OR further assessment undertaken see below**

Where there is some improvement but dismissal is not warranted further assessment(s) made up to or at 17 weeks employment which may be terminated with two weeks' notice where the required standard has not been attained.

**OR**

**Move to 17 week assessment if assessment satisfactory**

## **WEEK 17: ASSESSMENT UNDERTAKEN**

### **Unsatisfactory assessment report**

- Employment may be terminated with two weeks' notice where required standard of performance is not attained and it is established that employee is not suited to the post.

**OR**

- Further assessment(s) made up to or at 26 weeks service during which time employment may be terminated with 1 months' notice where the required standard has not been attained

**OR**

- **Move to 26 week assessment satisfactory**

## **WEEK 26: ASSESSMENT UNDERTAKEN**

### **Unsatisfactory assessment report**

- At 26 weeks employment - Employment terminated with 1 months' notice where required standard of performance is not attained

**OR**

- EXTENDED PROBATIONARY PERIOD in line with 6.1 above

**OR**

### **Satisfactory Assessment report**

- Appointed to an established post shall be transferred to the permanent staff.

**OR**

- Temporary employees shall be confirmed to the temporary post for the duration of the contract. Where the contract is renewed, the temporary employee shall not be subject to a further period of probation to that particular post.