

# **JOHN TAYLOR MULTI ACADEMY TRUST**



## **Probationary Periods Policy for Support Staff**

**Policy owner:  
COO**

**Barbara Mahoney, JTMAT**

Implementation date: September 2016

Reviewed on: July 2022

Next review date: September 2024

## **Legislative framework**

No specific legislation applies to the subject of Probationary Periods.

## **Policy statement**

Appropriate Probationary Periods will be applied to all eligible employees under the National Joint Council Terms and Conditions and those negotiated and agreed through local arrangements.

## **Trade Union**

Trade unions are represented within John Taylor Multi-Academy Trust and can assist with this process. 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.

## **HR advice**

The MAT's HR provider can assist with the interpretation and application of this process. It is recommended that a HR representative be contacted at the earliest stage so that appropriate advice, guidance and support can be offered to both the manager and employee.

## **GUIDANCE ON HOW TO APPLY THE POLICY**

### **Levels of Authority**

Throughout this policy document, there are many references to 'manager'. For the purposes of this policy, 'manager' is the person delegated by the CEO to perform the task. The manager could vary according to staffing structures, but it is likely to be the employee's line manager.

### **Eligibility**

This policy applies to all new entrants to John Taylor MAT.

### **Provisions**

When a new employee enters a post within JTMAT, they will be subject to a probationary period of 6 months. The purpose of this probationary period is for the employee and manager to review the individuals' performance in their new role 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. During the 6 month probationary period the notice entitlement will be one week for either side.

## **Initial induction meeting and discussion**

The manager, as part of the employees' induction, should meet with the employee as soon as practicable after the first week of employment. This meeting should cover:

- the managers expectations of the employee in the new role;
- the job requirements linked to the competency framework and performance systems detailing what is expected on a day to day basis and over the forthcoming year;
- attitudes and behaviours expected;
- the identification of realistic targets and actions arising from the general requirements of the role as well as special objectives arising from the business 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 manager and employee will also agree future meetings in order to review the employees' performance and training needs during the probationary period.

The manager will record the targets and training needs on the appropriate documentation and it will be agreed and signed by the employee and manager.

## **Ongoing meetings**

The manager will review, with the employee, their performance and training needs on a regular basis throughout their probationary period as agreed in the initial induction meeting. This will ideally be done on a monthly basis or more often if problems are encountered.

The meetings will be done through one to one meetings and should cover:

- the employees' progress against tasks/targets;
- discuss any training received during the period and its effectiveness;
- address any issues or concerns that may have arisen;
- revise or identify new targets in line with performance;
- identify any additional training or support required.

The detail of the meeting will be recorded fully on the appropriate documentation and signed by the employee and manager (see Appendix 1). The purpose of these meetings is to ensure that the employee completes their probationary period satisfactorily. The 12 week monitoring meeting should also act as a formal interim review meeting to ensure progress is heading in a satisfactorily direction.

## **End of probationary period**

The manager, after the specified probationary period, should complete a final review with the employee. At this point the manager 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 manager should be fully confident that the employee is competent to deliver the role.

- (ii) Extension of the probationary period - this should be where the employee has had some difficulty in meeting their probationary targets and milestones. The manager should have begun to address the relevant issues during the probationary period and be offering additional support and training. The extension period should be realistic whereby the employee can ideally achieve the expected targets and competencies.

Following the extension period the manager has two options:

- (a) Confirmation of the employee in post - this should be where the employee has successfully completed and achieved all their probationary targets and milestones. The manager should now be fully confident that the employee is competent to deliver the role.
- (b) Terminate the employees' contract of employment - this should be where the employee still has not achieved their probationary targets and milestones. The manager should be confident that the individual would not be able to perform the role competently and to the required standards.
- (iii) Terminate the employees' contract of employment - this should be where the employee has not achieved their probationary targets and milestones. The manager should have addressed the relevant issues during the probationary period and offered a lot of training, support and guidance. The manager should be confident that the individual would not be able to perform the role competently and perform to the required standards.

### **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 overclaimed holiday payments received. These payments will be calculated according to the Employment Rights Act 1996.

### **Accountabilities**

#### **Employee accountabilities**

- To be available to discuss their role and identify appropriate targets and milestones.
- To actively participate in any training and development programmes identified in order 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

#### **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 future review meetings throughout the probationary period in order to discuss performance and training issues and offer additional support and guidance as and when required
- To set realistic and achievable targets and milestones
- To be fair, equitable, open and honest in the treatment of all employees
- To either confirm, extend or terminate the employees' contract of employment after a final discussion with the employee in a timely manner

#### **Further advice and information**

If you need any further advice on how to apply this policy please contact the appropriate manager in your school.

#### **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.





**JT MAT**

**PROBATIONARY PERIOD REVIEW REPORT**

**Name:** .....

**Post:** ..... **Line Manager:** .....

Targets and standards should now have been set for the employee in line with the person specification and business plan. These will have been formally recorded and the employee issued with a copy. The areas below are for guidance only. Please add in or remove areas in line with specific job requirements.

<p><b>1.</b></p>	<p><b>TARGETS, STANDARDS AND FLEXIBILITY</b>                  The employee is demonstrating that they are working towards their recorded targets and standards. Please give examples to support this OR please indicate any areas of concern and action to be taken. Please also note areas in which flexibility is being demonstrated in the role</p>		
	<p>8 weeks</p>	<p>16 weeks</p>	<p>24 weeks</p>

<p><b>2.</b></p>	<p><b>KNOWLEDGE (See original job description and person specification)</b>  The employee is demonstrating that they have the necessary level of understanding required to carry out the job duties, and is performing tasks identified on the job description. Please give examples to support this OR please indicate any areas of concern and action to be taken.</p>		
	<p>8 weeks</p>	<p>16 weeks</p>	<p>24 weeks</p>
<p><b>3.</b></p>	<p><b>INTERPERSONAL SKILLS ( See original job description and person specification)</b>  The employee is demonstrating their written and verbal communication skills in relation to colleagues, customers, senior officers etc in line with the job requirements, and is performing tasks identified on the job description.. Please give examples to support this OR please indicate any areas of concern and action to be taken.</p>		
	<p>8 weeks</p>	<p>16 weeks</p>	<p>24 weeks</p>



4.	<b>IT SKILLS (see original job description and person specification)</b> The employee is demonstrating the IT, word processing skills and related knowledge in line with the job requirements, and is performing tasks identified on the job description. Please give examples to support this OR please indicate any areas of concern and action to be taken. Please note what is expected from the employee at each stage.		
	8 weeks	16 weeks	24 weeks
5.	<b>TEAM WORKING</b> The employee is demonstrating their commitment/contribution to team working. Please give examples to support this OR please indicate any areas of concern and action to be taken.		
	8 weeks	16 weeks	24 weeks

6.	<b>MANAGEMENT SKILLS (if applicable)</b> The employee is demonstrating effective management skills. Please give examples to support this OR please indicate any areas of concern and action to be taken. Need to be clear with the employee about what is expected at each stage in the process.		
	8 weeks	16 weeks	24 weeks
7.	<b>ATTENDANCE</b> Please ensure that the employee is aware of the Sickness Absence policy. Please record any absence and note any action recommended. Timekeeping should also be covered under this heading.		
	8 weeks	16 weeks	24 weeks

8.	<b>TRAINING AND DEVELOPMENT</b> Please note any training requirements at any stage, including health and safety training.
9.	<b>OTHER REQUIREMENTS/ISSUES (to include areas such as attitude)</b> Please note any other requirements or issues at this stage.

**10. SIX MONTH STAGE**

Please comment on the overall review of performance at six month stage. Include all successes and progress of employee against targets/standards and flexibility.

At the end of the six month probation it is important that employees' contribution is recognised and they are formally told that they are performing to the standards required for the job.

**8 weeks**

Signature of employee:.....

Date:.....

Signature of line manager:.....

Date:.....

**16 weeks**

Signature of employee:.....

Date:.....

Signature of line manager:.....

Date:.....

**24 weeks**

Signature of employee:..... Date:.....

Signature of line manager:..... Date:.....