

Leading Learners Multi Academy Trust



Staff Probation Policy

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Statement of intent

Leading Learners Multi Academy Trust recognises the importance of ensuring that its new staff members are performing to a satisfactory standard and that they are receiving appropriate support as they settle in to their new role.

The probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. We use this period to evaluate employees' capability, work habits and overall performance. This policy outlines the trusts provision regarding probationary periods and informs staff of their rights and expectations during their probation.

1. Legal framework

This policy has due regard to all relevant legislation and guidance including, but not limited to, the following:

- Equality Act 2010
- Employment Rights Act 1996
- DfE (2021) 'Staffing and employment advice for schools'

This policy operates in conjunction with the following school policies:

- Child Protection and Safeguarding Policy
- Staff Code of Conduct
- Staff Equality, Equity, Diversity and Inclusion Policy
- Induction of New Staff Policy

2. Roles and responsibilities

The headteacher/Line M will:

- Be responsible for the overall implementation of this policy.
- Deal with any concerns the line manager has regarding new employees
- Welcome new employees to the school and congratulate them on the completion of their probation period.
- Ensure the school's relevant policies and procedures are in place in order to ensure probationary periods run smoothly.

The line manager will:

- Observe whether the new employee is enjoying their role.
- Support the new employee with integrating them within the school.
- Introduce the new employee to their colleagues.
- Ensure they are developing and transferring their knowledge, skills and abilities successfully.
- Report any concerns they have regarding new employees to the headteacher.

New employees will:

- Use the probationary period to assess whether the role is right for them.
- Consider their own capability by being self-critical about their own skills, performance, attendance and general conduct.
- Discuss with their line manager how they can use their skills to successfully integrate into their new role.

3. The probationary period

The school's probationary period will last six months for support staff on scale point 23 and above and three months for support staff on scale 22 and below.

Prior to the commencement of their probationary period, all new employees will be given a full induction which includes a list of key policies and risk assessments and where they are located

All new staff will be expected to read, understand and act in accordance with these policies during their probationary period.

During the induction process, the line manager will explain how the probationary period will work and cover the following points:

- What the employee is expected to achieve in their role during the probationary period and thereafter.
- Details of the core values of the organisation and behaviours expected of the employee.
- The standards of regular attendance expected from the employee.
- The standards of service expected from the employee.
- Any development required to help the employee to do their job.
- How any problems with performance will be addressed.
- When the probationary period review meeting will take place.

The line manager will ensure the new employee understands this information and who they can turn to for any questions and support.

The line manager will set out details of what structured training, guidance and supervisory support the new employee can expect to help them achieve the required standards.

The line manager will explain the mechanism for identifying and discussing any problem areas at the earliest opportunity, together with the provision of regular, constructive, two-way feedback.

All new employees will be inducted in line with the school's Induction of New Staff Policy.

4. Review during the probationary period

During the probationary period, a series of formal review meetings will take place between the new employee and their line manager, including:

Support staff on scale points 22 and below:

- On the first day of the new role (included in induction process).
- No later than week 4 in the new role.
- No later than week 8 in the new role.
- No later than week 12 in the new role.
- Where an extension is required, review meetings will take place at least once every four weeks.

Support staff on scale points 23 and above:

- On the first day of the new role (included in induction process).
- No later than week 4 in the new role.
- No later than week 8 in the new role.
- No later than week 16 in the new role.
- No later than week 24 in the new role.
- Where an extension is required, review meetings will take place at least once every four weeks.

Prior to all meetings, the line manager will prepare a probation review form to help discussions during the meeting. The line manager will keep full, clear records, and will document all meetings throughout the probationary process, ensuring all documentation is signed off by both the new employee and the line manager. A copy of all paperwork will be given to the employee.

5. Overcoming challenges and providing support

If the employee is experiencing problems at any stage during their probationary period, their line manager will discuss these with the employee as soon as possible and will not wait until the next scheduled review meeting.

The line manager will use these meetings to ensure sustained improvement in performance of the new employee and that the employee has had sufficient opportunities to achieve this.

The new employee's wellbeing will be supported in line with the school's Health and Wellbeing Policy.

At any review meeting with the employee where there are issues to be addressed, the line manager will:

- Reinforce the areas where the employee is doing well.
- Be open and honest with the employee about their shortcomings. Provide documentary evidence whenever possible.
- Give the employee the opportunity to respond. There might be some other factor behind the problem.
- Try to reach an agreement on the nature of the problem. If joint agreement can be reached, the employee is more likely to react positively to any suggestion for improvement.
- Offer guidance and support on how to overcome the difficulties. This might include extra training, coaching or closer supervision.
- Ensure the employee understands the degree of progress required and that successful completion of the probationary period is dependent on it.
- Warn the employee that if this standard is not reached, it will be necessary to terminate their employment.
- In the case of misconduct, short of gross misconduct (for which summary dismissal will be appropriate), warn the employee that any further misconduct will lead to immediate termination of their employment.

6. Successful outcome of probationary periods

If the employee's probationary period is satisfactory, the manager will inform the employee at the final meeting that their appointment will be confirmed, and a successful outcome letter will be sent to confirm this.

7. Extending the probationary period

The line manager will use their professional judgement to assess whether the probation needs to be extended to allow the employee further time to improve their performance and to demonstrate competence in the full range of duties and required behaviours.

If the new employee's performance is unsatisfactory in some areas, but their line manager feels that further training and support may bring the employee up to the required standard, an extension will be considered on a monthly basis.

The '[Overcoming challenges and providing support](#)' section of this policy will also be adhered to in cases where the employee has been absent from the workplace for an extended period during probation due to circumstances beyond their control, e.g. illness or bereavement.

Extensions to the probationary period will be made before the end of the original period of probation and the line manager will inform both the new employee, a member of the SLT and a member of the trust HR team of the extension and the reasons why.

The line manager will set out the terms of the extension in writing to the new employee. The notification will include:

- The length of the extension and the date on which the extended period will end.
- The reason for the extension, e.g. that the employee's performance has fallen short of certain standards, but that the line manager reasonably believes that an extension will enable the employee to achieve these standards.
- The performance standards or objectives that the employee is required to achieve by the end of the extended period of probation.
- Any support, such as further training, that will be provided during the extension.
- The condition that if the employee does not meet fully the required standards by the end of the extended period of probation, their employment may be terminated.

8. Termination of contract

Where a decision to terminate the employee's contract has been made, the line manager will meet with the employee, having given them at least five days' notice in writing.

The employee will be advised that they may be represented by a trade union representative or work colleague during the meeting.

The line manager will set out clearly the reasons why the employee has not successfully completed the probationary period and will give the employee the opportunity to present their case, including any mitigating circumstances.

A letter will be provided to the employee confirming the reasons for the termination of employment.

9. Monitoring and review

This policy will be monitored and reviewed by the school's employer annually.

The next scheduled review date for this policy is June 2028.

Any changes to this policy will be communicated to all relevant stakeholders.

Appendix 1 – Probation Form – Scale Point 22 and below



PROBATIONARY PERIOD REVIEW FORM SUPPORT STAFF SCALE POINT 22 AND BELOW

The probationary period applies to all new staff. It does not apply to anyone who has continuous service with Leading Learners Multi Academy Trust with no break in service.

A probationary period of three months with a possible extension to six months applies for employees paid SCP 22 and below. Probationary periods must not be for more than 12 months in total.

1. Employee Details:

Name of Employee:			
Role:			
Employment Start Date:			
Review Week: (tick as appropriate)	Week 4 ☐	Week 8 ☐	Week 12 ☐

2. Performance to Date:

	Good	Satisfactory	Unsatisfactory
Timekeeping			
General standard of work			
Knowledge of duties			
Ability to work without supervision			
Attendance			
Relationships with colleagues			
Relationship with parents			
Relationship with senior management			
Ability to accept responsibility			

Any additional comments/concerns – (please continue on a separate sheet if necessary):

3. Satisfactory Progress - Next Steps:

(Please complete as applicable)

Next meeting date:	
Probationary period end date:	

4. Probationary Period to be Extended:

The line manager will use their professional judgement to assess whether the probationary period needs to be extended to allow the employee further time to improve their performance and to demonstrate competence in the full range of duties and required behaviours.

Next Steps:

Length of extension:	
Extended probationary period end date:	
Reason for extension:	
Standards or Objectives to achieve:	
Further training to be provided (if applicable):	
N.B. The employee should be made aware that if they do not meet the required standards by the end of the extended probationary period, they are at risk of having their employment terminated.	

5. Declaration:

Name of person conducting review:	
Role of person conducting review:	
Signature:	
Signature of Employee:	
Date:	

N.B. Employee should be provided with a signed copy of this document and a copy retained on file

Appendix 2 – Probation Form – Scale Point 23 and above



PROBATIONARY PERIOD REVIEW FORM SUPPORT STAFF SCALE POINT 23 AND ABOVE

The probationary period applies to all new staff. It does not apply to anyone who has continuous service with Leading Learners Multi Academy Trust with no break in service.

A probationary period of six months with a possible extension to 12 months applies for employees paid SCP 23 and above. Probationary periods must not be for more than 12 months in total.

1. Employee Details:

Name of Employee:				
Role:				
Employment Start Date:				
Review Week: (tick as appropriate)	Week 4 ☐	Week 8 ☐	Week 16 ☐	Week 24 ☐

2. Performance to Date:

	Good	Satisfactory	Unsatisfactory
Timekeeping			
General standard of work			
Knowledge of duties			
Ability to work without supervision			
Attendance			
Relationships with colleagues			
Relationship with parents			
Relationship with senior management			
Ability to accept responsibility			

Any additional comments/concerns – (please continue on a separate sheet if necessary):

3. Satisfactory Progress - Next Steps:
(Please complete as applicable)

Next meeting date:	
Probationary period end date:	

4. Probationary Period to be Extended:

The line manager will use their professional judgement to assess whether the probationary period needs to be extended to allow the employee further time to improve their performance and to demonstrate competence in the full range of duties and required behaviours.

Next Steps:

Length of extension:	
Extended probationary period end date:	
Reason for extension:	
Standards or Objectives to achieve:	
Further training to be provided (if applicable):	
N.B. The employee should be made aware that if they do not meet the required standards by the end of the extended probationary period, they are at risk of having their employment terminated.	

5. Declaration:

Name of person conducting review:	
Role of person conducting review:	
Signature:	
Signature of Employee:	

N.B. Employee should be provided with a signed copy of this document and a copy retained on file

Appendix 3 – Extended Probationary Period Review Form



EXTENDED PROBATIONARY PERIOD REVIEW FORM

1. Review of Extended Probationary Period Targets:

Have the Standards or Objectives set now been met? (please give details):	
Has any further training that was assigned now been completed?	
Additional comments	

2. Next Steps:*(Please complete as applicable)*

Probationary period to be extended further - Next meeting date:	
Probationary period completed satisfactorily – End Date:	
Standards and objectives still not met – Employee notified that there employment may be terminated. A letter will be sent out to them in due course, inviting them to a meeting to discuss this matter.	Employee aware ☐

3. Declaration:

Name of person conducting review:	
Role of person conducting review:	
Signature:	
Signature of Employee:	
Date:	

N.B. Employee should be provided with a signed copy of this document and a copy retained on file



PROBATIONARY PERIOD TARGETS NOT MET GUIDANCE ON TERMINATING EMPLOYMENT

If a decision is made to terminate an employee's employment, the line manager must take the following steps:

1. Notify the trusts HR.
2. Notify the employee in writing (template letter to be obtained from trusts HR officer) of the schools intention to terminate their employment. The letter will include the following details:
 - The date of the meeting giving at least five days 'notice.
 - That they may be accompanied to the meeting by a trade union representative or work colleague.
 - The reasons why the employee has not successfully completed their probationary period.
 - That they will be given an opportunity to present their case at the meeting.
3. A copy of the letter should be handed to the employee in person.
4. A copy of the letter is kept on their HR file.