



PROBATIONARY POLICY

Endeavour Multi Academy Trust

DOCUMENT CONTROL		
Approved for operation within	Endeavour Multi Academy Trust	
Version number	V3.0	
Consulted on with recognised trade unions	10/06/2025	
Reviewed by	Trust Policy Oversight Committee	
Recommended to Full Trust Board by	Trust Policy Oversight Committee	
Date approved by the Trust Board	14/07/2025	
Risk Register Item Number	9	
Review Period	Every two years	
Next Review Date	Summer 2027	
Policy status	Non-statutory	
Location published	Internal	
Owner	CEO/CFOO	
DOCUMENT HISTORY		
DOCUMENT HISTORY DATE	DOCUMENT VERSION	DOCUMENT HISTORY
Summer 2022	V1.0	Scheduled Review
Summer 2023	V2.0	Scheduled Review
Summer 2025	V3.0	Scheduled Review – no changes

Contents Page

1. Policy Statement
2. Eligibility
3. Provisions
4. Initial Induction Meeting and Discussion
5. Ongoing Probationary Review Meeting
6. End of Probationary Period
7. Accountabilities
8. Trade Unions
9. Appeal

1. Policy Statement

The probation policy will be applied to all eligible staff members under the National Joint Council Terms and Conditions (which applies to Support staff) and those negotiated and agreed through local arrangements.

Reference to staff members throughout the Policy refers to Support staff only.

2. Eligibility

This policy applies to all new non-teaching staff members to the Trust.

3. Provisions

When a new staff member enters a post within the Trust, they will be subject to a probationary period. The purpose of this probationary period is for the staff member and their 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 staff member will be officially confirmed in post.

Prior to the staff member commencing with the Trust, they will receive a Written Statement of Particulars that will state whether or not their contract is subject to a probationary period. If the staff member is subject to a probationary period, it will be for a 6-month period unless this is extended in line with this policy.

4. Initial Induction Meeting and Discussion

The Manager, as part of the staff members' induction, should meet with the staff member during the first week of employment and discuss their probation plan

This meeting should cover

- Their expectations of the staff member in the new role, the job requirements linked to the standards detailing what is expected of the staff member in their role.
- Our expectations in terms of your conduct for example - staff member 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 Trust;
- the identification of realistic objectives and actions arising from the general requirements of the role as well as special objectives arising from the Trust's 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 staff member will also agree future meetings in order to review the staff members' performance and training needs during the probationary period.

The manager will record the objectives and training needs on the appropriate documentation, and it will be agreed and signed by the staff member and Manager.

5. Probationary Review Meetings

Throughout the probationary period, the line manager will monitor and review, with the staff member, their performance and progress and will provide feedback during half termly meetings or more often if problems are encountered.

The meetings will be carried out through one-to-one meetings and should cover;

- the staff members' progress against objectives,
- discuss any training received during the period and its effectiveness, address any issues or concerns that may have arisen with regards to their competence or performance, including concerns about their attendance, punctuality, and reliability;
- revise or identify new objectives 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 staff member and manager. The purpose of these meetings is to ensure that the staff member completes their probationary period satisfactorily and receives all necessary training and support.

In addition to these meetings, the line manager will check in with the staff member regularly to ensure they understand what is needed, provide feedback and check that they are receiving sufficient support.

6. End of Probationary Period

The manager should complete a final review with the staff member before the end of the specified probationary period (i.e. shortly before end of month 6). At this point the Manager has three options:

- (i) Confirmation of the staff member in post - this should be where the staff member has successfully completed and achieved all their probationary objectives and milestones. The manager should be fully confident that the staff member is competent to deliver the role.
- (ii) Extension of the probationary period - this should be where the staff member has had some difficulty in meeting their probationary objectives 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 staff member can ideally achieve the expected objectives and competencies. The extension of the probation period should be no more than 3 months and should be confirmed in writing to the staff member. Following the extension period, the manager has two options
 - a) Confirmation of the staff member in post - this should be where the staff member has successfully completed and achieved all their probationary objectives and milestones. The manager should now be fully confident that the staff member is competent to deliver the role
 - b) Terminate the staff member's contract of employment - this should be where the staff member still has not achieved their probationary objectives 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 staff member's contract of employment - this should be where the staff member has not achieved their probationary objectives and milestones. The Headteacher 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.

7. Accountabilities

Staff member Accountabilities

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

Manager Accountabilities

- To arrange to meet all new staff members within the first week of employment to discuss their new role and identify appropriate objectives, 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 objectives and milestones.
- To be fair, equitable, open, and honest in the treatment of all staff members.
- To either confirm, extend, or terminate the staff members' contract of employment after a final discussion with the staff member in a timely manner.

8. Trade Union

At any point during this process, the staff member is able to contact their trade union for appropriate advice, guidance, and support. Likewise, the Trust can contact a HR representative for advice and guidance

9. Appeal

A staff member does have the right of appeal against the decision to dismiss them during their probationary period. If they wish to appeal, they must notify the Clerk to Governors in writing, within five working days of the written notification of the outcome of their intention to appeal.

The letter should clearly state the grounds on which the staff member is appealing.

It should include:

- a) the grounds of appeal which may include:
 - I. Facts disputed
 - II. Procedural fault or principles not followed
 - III. Evidence not fully considered
 - iv. Outcome not considered appropriate

Staff members can be supported at the appeal, if they wish, by a work colleague or trade union representative. The Trust can be supported and advised by a HR representative at the appeal meeting.

The appeal will be heard by a panel of 3 governors/trustees who have not been involved in any prior decision making and should be arranged as soon as reasonably practicable. The appeal panel may be supported by a specialist adviser; the adviser has no decision-making powers.

The outcome of the appeal will be given as soon as possible and no later than 5 working days after the appeal meeting. The outcome of the appeal is final.