



Please note that subsequent to the approval of this policy, the name of the organisation changed to The Partnership Trust. All references to The Bath and Mendip Partnership Trust should be read as The Partnership Trust

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HR: Staff Probationary for Support Staff Policy

REVIEW DUE:	SEPTEMBER 2020
LAST REVIEW	September 2017
APPLICABLE TO:	All Trust Schools
REVIEWED BY:	
APPROVED BY	Trust Board

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PLEASE NOTE THAT, SINCE CREATION OF THIS POLICY THE PARTNERSHIP TRUST HAS CHANGED ITS NAME TO THE BATH AND MENDIP PARTNERSHIP TRUST. ALL REFERENCES IN THIS POLICY TO THE PARTNERSHIP TRUST ARE TO BE READ AS THE BATH AND MENDIP PARTNERSHIP TRUST

1. Policy Statement

- 1.1 The procedure set out below has been drawn up in order that all school support staff within their probationary period of employment are dealt with in a fair and equitable manner.
- 1.2 This policy is intended to allow both the employee and the Trust to assess objectively whether or not the employee is suitable for the role.
- 1.3 The period of time normally allowed for an assessment is six months and in exceptional circumstances this period may be extended.
- 1.4 The procedure does not prejudice the outcome of any particular hearing or case, but indicates how to proceed if further action is considered necessary. The use of one stage of the procedure does not mean that the next stage follows automatically.
- 1.5 Copies of this document will be made freely available to all employees of the school and will be given to all new employees as part of the induction process.

2. The Procedure

- 2.1 Regular meetings should be held with new employees during the probationary period to discuss progress and offer an opportunity to give adequate instruction and guidance to resolve any difficulties that the employee may encounter. Notes may be taken and the employees comments recorded, of these meetings and a copy placed on the Employee's personnel file and also shared with the Employee.
- 2.2 After three months a formal probationary meeting should be held with the employee's direct line manager to review progress and raise any concerns with performance. This is also an opportunity for employees to raise any concerns that they may have about their employment.
- 2.3 If at the first three month review there are aspects of performance that are unsatisfactory, then the employee will be informed of where their performance does not meet the criteria and a plan will be agreed along with timescales, appropriate training and any support that will be given to allow the employee to improve their performance.
- 2.4 Where the situation warrants it, a warning may be given that, unless substantial improvement is achieved, confirmation of the appointment may not be made and further formal meetings may be held.
- 2.5 Prior to the conclusion of the six-month period there will be a further meeting to review progress. At this meeting if performance is satisfactory the appointment can be confirmed.
- 2.6 Confirmation of an employee's successful probationary period and confirmation of their employment will be made in writing to the employee.

3. Where performance is not satisfactory

- 3.1 If however insufficient improvement has been made with regards to satisfactory performance then the matter should be referred to the designated senior member of staff for a decision on whether the probationary period is extended or the employee's services terminated.
- 3.2 The employee will be given at least [5] working days' notice of the Formal Probationary Hearing.
- 3.3 The designated senior member of staff will consider the matter and will offer the employee the opportunity in writing, if he/she wishes, to make oral representations or a written statement at a Formal Probationary Hearing. He/she will have the right to be accompanied by a work colleague or trade union representative.
- 3.4 Where the designated senior member of staff decides that it is inappropriate to extend further the period of review, they may terminate the appointment within the probationary period. Where such a decision is made the designated senior member of staff will inform the employee verbally at the hearing.
- 3.5 The designated senior member of staff will confirm his/her decision and the reason for that decision to the employee in writing within 5 working days.
- 3.6 Where the decision is made to extend the employee's probationary period, the employee will be informed of:
 - a) The duration of the extension
 - b) The reason for the extension
 - c) Details of the improvement required
 - d) The arrangements of support, monitoring and reviewing the extended period.
- 3.7 Towards the end of the period of extension a final review meeting will take place and probation report be completed. Should performance have improved to a satisfactory level, the employee will receive written confirmation of the successful completion of their probationary period.

4. Right of appeal

- 4.1 Where there is a decision to dismiss there is a right of appeal to the Appeals Panel of the Governing Body. The appeal should be lodged in writing to the governing body within 10 working days of the receipt of the letter informing the employee of the decision. The employee will have the right to be accompanied by a work colleague or Trade Union at the appeal hearing.
- 4.2 The decision of the Appeals Panel is final.