

**PROBATION
PROCEDURES**
December 2025

Passmores Co-operative Learning Community

PCLC Position Statement

All PCLC schools have an approach that is based on the following key principles:

- **Our unconditional positive regard ensures that every young person is highly valued and expected to achieve their potential;**
- **every young person has the right to be successful and has ability to achieve, no matter what their socio-economic background;**
- **there is no limit to achievement – intelligence can be developed;**
- **each student must know what to do in order to improve and how to do it, high expectations on their own are not enough;**
- **consistency of experience is fundamental; each school is a team and consistency makes us greater than the sum of our parts;**
- **employment opportunities in PCLC schools should allow all colleagues to inspire a love for learning; not simply process and record what we find.**

By ensuring all of actions and decisions adhere to these principles our community members:

- **are highly valued and expected to achieve their full potential, no matter what their socio-economic background;**
- **benefit from an inclusive ethos, excellent teaching and a broad and balanced curriculum underpinned by strong leadership, in a local school;**
- **are supported and encouraged to lead healthy and active lives making sensible choices, whilst respecting the views and attitudes of others.**

Updates since last edition October 2023

Reviewed in line with cycle – no changes.

This policy is based on the Juniper Model September 2022 edition. Latest updates September 2025.

The PCLC Trustees formally reviewed and approved the policy on 15th December 2025.. This policy will be reviewed when the Juniper Education model policy is updated, and / or in the event of any changes to legislation. Recommended review December 2027.

Contents	Page No:
1. Introduction	5
2. Scope	5
3. Roles and Responsibilities	6
4. The Probationary Procedure	6
5. Extensions to Probationary Periods	9
6. Records and Data Protection	9
Appendix 1 Summary Probation Procedure	10

1. Introduction

- 1.1** This procedure sets out how probationary periods will be managed.
- 1.2** Probation is a period during which both the line manager and the employee can assess objectively whether the new recruit is suitable for the role, taking into account the individual's overall capability, skills, performance and general conduct in relation to the job.
- 1.3** All new employees' performance will be supported, monitored and assessed through Performance Management procedures to ensure that they are able to fulfil their new role and responsibilities. The probationary process will run alongside the performance management procedure and will include ensuring that new employees are provided with appropriate induction, training and support to enable them to properly carry out their duties and tackling any problems as and when they arise.
- 1.3** The following will be made clear to new employees at the outset of the probationary period:
- job role / tasks, including any specific responsibilities;
 - any required standards of performance e.g. Teachers', HLTA and any other relevant Standards;
 - required standards of conduct and behaviour; and
 - their responsibility for their own continuous development.

2. Scope

- 2.1** All new entrants to the employment of this employer will be subject to the satisfactory completion of a 26-week probationary period (unless their appointment arises from a statutory transfer or they are a newly qualified teacher subject to a Statutory Induction Period). During the probationary period, new entrants will be expected to establish their suitability for the post.
- 2.2** Any employees who are internally promoted or who change their role will not be covered by this procedure.
- 2.3** The 26-week probationary period will be calendar weeks except in the case of term-time only support staff where it will be based on contracted working weeks. The contract will either be confirmed, terminated or extended at the end of the probationary period, subject to notice requirements as set out below (see 4.8 below). The probation period may be extended beyond 26 weeks at the employer's discretion (for example, where there has been significant absence – see 5. below).
- 2.4** If the employee decides they do not wish to continue in the role at any point during the probationary period they must give notice in line with their contract of employment. The school may decide, at their discretion, to waive this notice requirement.
- 2.5** Minor incidents of misconduct will normally be dealt with as part of the probation procedure. Other more serious or recurring disciplinary issues arising during the probationary period will be dealt with under the Disciplinary Procedure.

During the probationary period, whilst the principles of reasonableness and natural justice reflected in the Disciplinary Procedure and the ACAS Code will apply, it may be appropriate to foreshorten procedures, processes and relevant timescales, depending on the individual circumstances of each case. Any such conduct issues will also be taken into account when

assessing overall suitability as part of the probationary process.

3. Roles and Responsibilities

- 3.1 The probation procedure will be operated by the employee’s line manager.
- 3.2 A decision to confirm, or not to confirm, the appointment pursuant to this probationary procedure will be taken by the person specified in the table below.
- 3.3 Any appeal against non-confirmation of appointment will be heard by the person specified in the table below.
- 3.4 All employees are expected to perform to the highest possible standards, to take responsibility for their own learning and development and to co-operate with strategies to support them.

3.5 Specific roles and responsibilities.

Employee	Manage procedure and make initial decisions ^{1*}	Hear appeal ¹
Academy Employee	Headteacher- recommend/deliver CEO - ratify	Subcommittee of PCLC governors to include at least two trustees (other than the Principal/CEO) to ratify and deliver.
Trust Employee (Central Services)	CEO – recommend / deliver LGB – consult Trust Board - ratify	Subcommittee of PCLC governors to include at least two trustees (other than the Principal/CEO) to ratify and deliver.

Note 1: The term “Headteacher” is used to identify the person with responsibilities of headship within each Academy, who may be referred to locally as Headteacher, Principal, or Primary Lead

4. The Probationary Procedure

The procedure is summarised at Appendix 1.

- 4.1 The employee’s line manager will monitor and review performance on a day-to-day basis and through the Performance Management process.

Formal probation reviews with the employee will take place at the following intervals after commencement of employment:

Support Staff

- 8 working weeks;
- 16 working weeks; and
- 24 working weeks - Final Review Meeting

Teachers

- Prior to the end of each half term

Interim meetings may be held as necessary. Informal discussions may also take place throughout the probationary period in addition to the formal review meetings.

Review meetings may be deferred where there have been significant periods of absence (e.g. sickness/family related leave). Such periods of absence will, however, be taken into account, where relevant, when assessing whether attendance has been satisfactory during the probationary period. Where appropriate, the employer may decide to manage periods of sickness under the Sickness Absence Management Procedure.

Any entitlement to sick pay during the probationary period will be set out in the contract of employment.

An employee may be subject to different review timescales under a contract of employment supported by an Apprenticeship Agreement.

4.2 The content and outcome of all meetings will be recorded, and a copy given to the employee.

4.3 The following matters will be discussed at each review meeting:

- performance against performance management objectives;
- performance against any relevant Standards;
- general competence, conduct, attitude/behaviour;
- attendance; and
- training and support provision and needs

4.4 An employee's contract will either be confirmed or terminated by the end of the 26-week probationary period, subject to contractual notice requirements. Probationary periods may only be extended in exceptional circumstances (see section 5).

4.5 If there is clear evidence, at an earlier stage, to suggest that the employee is wholly unsuitable for the role or incapable of performing the role (whether as a result of their conduct or lack of competency), and it is clear that further training or support is unlikely to alter the situation, the contract may be terminated at any point prior to the end of the probationary period. In this case, the employee will be invited to attend a meeting to confirm that they have failed to successfully complete their probationary period (as set out at 4.8.2 below) and the employee will normally be given notice pursuant to their contract of employment. Advice should be sought prior to invoking this section of the policy.

4.6 Where the contract is confirmed, employees will be subject to the capability and disciplinary procedures as appropriate. Their performance will continue to be supported through the performance management procedure.

4.7 At any point where the employee's progress is unsatisfactory in any respect:

- they will be advised of the areas where improvement is required;
- appropriate training and support will be identified;
- the employee will be advised that failure to improve could result in non-confirmation of appointment.

4.8 Final review review

The final review meeting will be conducted by the person set out in the table at 3.5 above and the line manager and the employee. At least 5 working days notice will be given of this meeting.

4.8.1 Successful probation period

Where progress has been satisfactory, the probationary period will be formally signed off following the final review meeting. A letter will then be sent to the employee informing them that they have successfully completed their probationary period and confirming their appointment.

4.8.2 Unsatisfactory probation period

Where an employee's progress has not been satisfactory, the employee will be formally invited in writing to the final probation review meeting with the Headteacher [or in the case of the Headteacher, the Chair of Governor's]

Prior to the meeting the line manager should compile relevant documentation evidencing the concerns, actions taken and procedures followed and provide this to the employee with the meeting invitation letter, at least 5 days in advance of the meeting.

The employee has a statutory right to be accompanied at this meeting by a trade union representative, an official employed by a trade union or work colleague. The employee must confirm the name and status of their representative prior to the meeting. A request for a companion other than a trade union official or work colleague will be considered at the employer's discretion. Employees are responsible for making their own arrangements for their chosen companion to attend the meeting.

At the meeting the manager will set out where progress has been insufficient, with reference to previous review meetings. The employee will be given an opportunity to make representations verbally and/or in writing.

The decision maker will determine at the end of the meeting, whether to:

- confirm appointment; (See 4.8.1 above);
- extend probation; (See 5. below);
- not confirm appointment and terminate the contract. Notice will be given in line with the employment contract.

The decision will be confirmed in writing within 5 working days of the date of the meeting.

Where the decision is non-confirmation the letter will give notice of termination of employment and the right of appeal.

Where considered appropriate, the employee may be redeployed to other duties during the period of notice or not required to attend for work.

4.9 Appeals

Employees have the right of appeal against a decision to terminate their contract.

Any appeal must be lodged in writing within 5 working days of receipt of the letter of notice of termination of employment. The employee may provide written evidence in advance of the appeal meeting.

All appeals will be heard by the Governing Board/dismissal appeal committee. The employee will be given at least 5 days' notice of the appeal meeting. The appeal panel will be provided with a copy of the paperwork referred to during the original hearing, and minutes of the meeting, the outcome letter and appeal letter.

The decision of the Appeal hearing will be confirmed in writing and will be final subject to the employees' rights in law.

5. Extensions to Probationary Periods

5.1 Extensions to the probationary period will normally only be granted at the final review meeting where the employee has been absent for a considerable amount of time during the probationary period and therefore has been unable to demonstrate their suitability for confirmation of appointment. There may also be occasions where additional training and support are required to improve performance and a longer period is necessary to assess the impact of such additional support. Where it is appropriate, reasonable adjustments will be considered for employees with disabilities.

5.2 The decision to extend will usually be made at the final review meeting

5.3 Extensions will not normally exceed an additional 12 weeks.

5.4 If an extension to the probationary period is agreed, the employer will confirm the terms of the extension in writing to the employee, including:

- the length of the extension and the date on which the extended period of probation will end;
- the reason for the extension and, if the reason is unsatisfactory performance, details of how and why performance has fallen short of the required standards;
- the performance standards or objectives that the employee is required to achieve by the end of the extended period of probation;
- any support, for example further training that will be provided during the extended period of probation; and
- a statement that, if the employee does not meet fully the required standards by the end of the extended period of probation, their employment will be terminated.

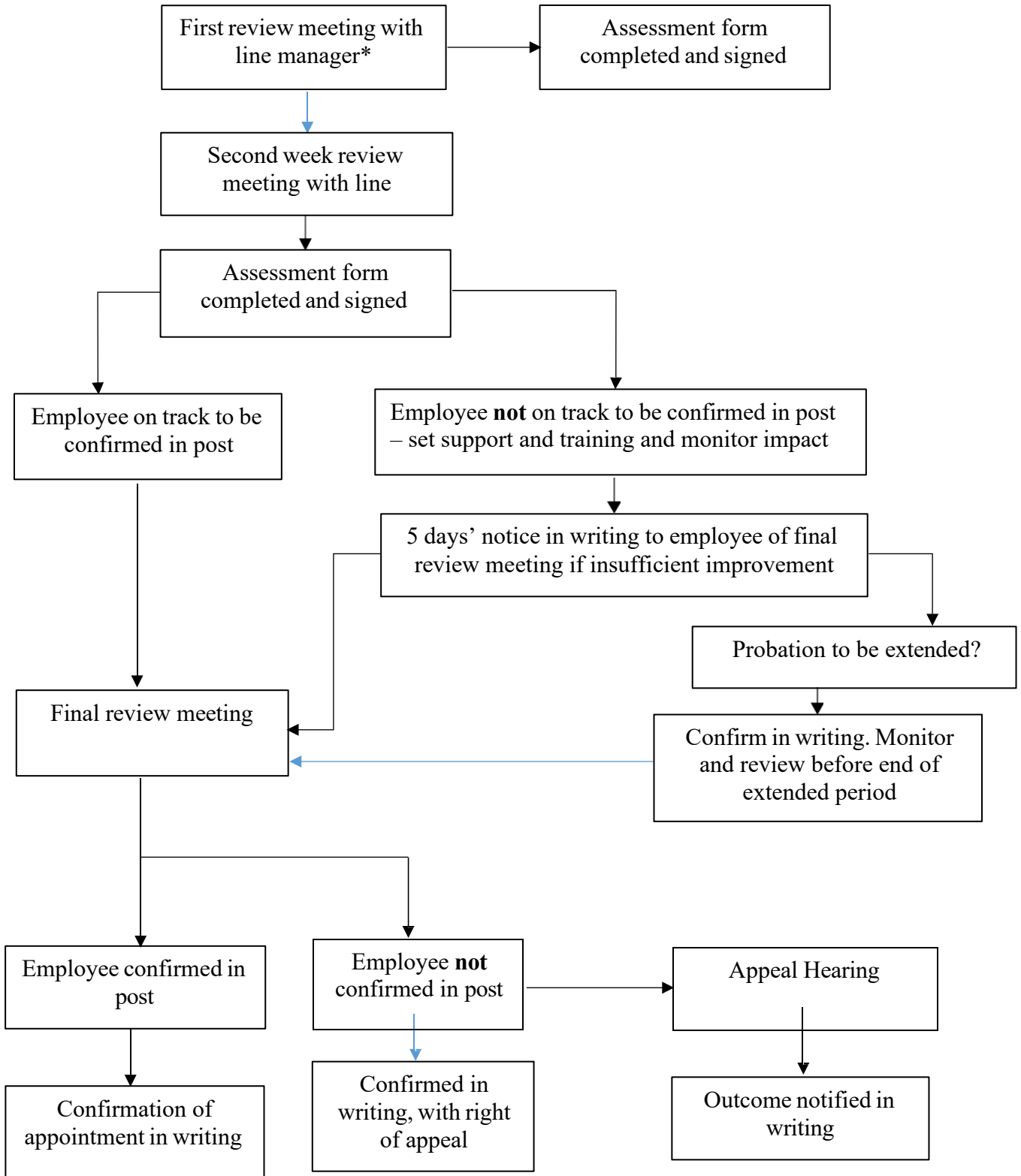
6. Records and Data Protection

6.1 A written record of all meetings conducted under this procedure will be made, either by the person holding the meeting or by an alternative person arranged to take notes. The school processes any personal data collected during the probationary procedure in accordance with its data protection policy.

Any data collected is held securely and accessed by, and disclosed to, individuals only for the purposes of completing the probationary procedure. On the conclusion of the procedure, data collected will be held in accordance with the school's retention schedule. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the school's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the disciplinary procedure

Appendix 1 Summary Probation Procedure

*if there is clear evidence to suggest the employee is wholly unsuitable for the role/incapable of performing the role at an earlier stage, the contract may be terminated prior to the end of the probationary period (see 4.5 in the procedure).





CONFIDENTIAL PROBATIONARY REPORT	8 WEEK/HALF REVIEW
School	Passmores Academy
Name of Employee	
Post	
Start Date	
End date of Probationary Period	
Line Manager	
Date of meeting	

Summary	Improvement required	Satisfactory	Good
Performance against objectives			
Performance against relevant Standards			
General competence			
Conduct			
Attendance			
Timekeeping			
Quality and accuracy of work			
Communication skills			
Work relationships (teamwork and interpersonal)			

Summary of discussion (explanation of assessment above)

Summary of training and support provided, and other needs identified

Action Plan (include outstanding or additional tasks, support, reasonable adjustments)			
Actions to be taken and reason	By whom	By when	Resources Identified

Overall, progress is / is not satisfactory	
Signed (Line Manager)	
Employee Comments	
Signed (Employee)	

CONFIDENTIAL PROBATIONARY REPORT	16 WEEK/HALF TERM REVIEW
School	



Name of Employee	
Post	
Start Date	
End date of Probationary Period	
Line Manager	
Date of meeting	

Summary	Improvement required	Satisfactory	Good
Performance against objectives			
Performance against relevant Standards			
General competence			
Conduct			
Attendance			
Timekeeping			
Quality and accuracy of work			
Communication skills			
Work relationships (teamwork and interpersonal)			

Summary of discussion (explanation of assessment above)

Summary of training and support provided, and other needs identified

Action Plan (include outstanding or additional tasks, support, reasonable adjustments)			
Actions to be taken and reason	By whom	By when	Resources Identified

Overall, progress is / is not satisfactory	
Signed (Line Manager)	
Employee Comments	
Signed (Employee)	
CONFIDENTIAL PROBATIONARY REPORT	FINAL: 24 WEEK/HALF TERM REVIEW
School	
Name of Employee	
Post	

Start Date	
End date of Probationary Period	
Line Manager	
Date of meeting	
Name of employee's representative (if formal meeting where probation period is unsatisfactory)	

Summary	Improvement required	Satisfactory	Good
Performance against objectives			
Performance against relevant Standards			
General competence			
Conduct			
Attendance			
Timekeeping			
Quality and accuracy of work			
Communication skills			
Work relationships (teamwork and interpersonal)			

Summary of discussion (explanation of assessment above)

Summary of training and support provided, and other needs identified

Is the employee's probation to be confirmed?	YES		NO	
<i>Where probation is not confirmed this will be confirmed in writing within 5 working days and the employee will have the right of appeal</i>				
Is the employee's probation period to be extended?	YES		NO	
<i>If, yes, give exceptional reasons for extension</i>				
<i>Period of extension (no of working weeks – not to exceed 12 weeks)</i>				
<i>End of extended probationary period</i>				

Further Actions (include outstanding or additional tasks, support, reasonable adjustments)			
Actions to be taken and reason	By whom	By when	Resources Identified



--	--	--	--

Signed (Line Manager)	
Employee Comments	
Singed (Employee)	