PROBATION PROCEDURES

September 2026

Passmores Co-operative Learning Community

Company no. 7736246

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.**

Juniper update - July 2026

Updates since last edition

3. Probation Period

- **Amended to 12 weeks in light of reduction in unfair dismissal rights period from 2 years to 6 months.**
- **Schools that follow the Burgundy Book must abide by notice periods meaning that for teachers, it will not be possible to operate probation for teachers.**
- **Wording to fall in line with written particulars for Teachers updated – MM Feedback from consultants**

5. Probation Procedure

- **Changes as above**

Other Sections

- **Some rewording/reformatting**

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 employee is suited to 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 and conduct will be supported, monitored and assessed to ensure that they are able to fulfil their new role and responsibilities. This 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.
The performance management procedure will commence upon the completion of the probationary period.

1.4 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. HLTA and any other relevant Standards;
- required standards of conduct and behaviour; and
- their responsibility for their own continuous development.
- Any reasonable adjustments that are mutually agreed

2. Scope

2.1 Probation periods apply to all new* staff on a permanent or fixed term basis.
2.2 Probation periods will not apply to:

- Appointments arising from a statutory transfer;
- Internal promotions or changes in roles
- Teaching staff

3. The Probation Period

3.1 The Probation Period is 12 weeks.

3.2 The 12-week probationary period will be calendar weeks except in the case of term-time only staff where it will be based on contracted working weeks.

3.3 During the probationary period, and prior to the employee's start date, employment may be terminated by either party in accordance with the notice provisions set out in the employment contract. The employer may, at its discretion, make a payment in lieu of notice.

3.4 Employees will be informed in writing when they have successfully completed their probationary period. If an employee does not receive written confirmation of successful completion, extension, or termination of probation, they should assume that the probationary period remains ongoing until confirmed in writing.

3.4.1 The probation period may be extended in exceptional circumstances at the employer's discretion (for example, where required improvements are evident or there has been significant absence – see 6. below).
3.4.2 In Community and Voluntary Controlled Schools, a new employee is an employee who is new to the

employment of the County Council. An employee moving between Community or Voluntary Controlled Schools will not normally be subject to a further probationary period.

In Foundation Schools, Voluntary Aided Schools and Academies, a new employee is an employee who is new to the employment of the relevant Governing Board or Trust.

Schools that are subject to the Burgundy Book provisions must comply with the applicable notice periods. As a result, it may not be practicable to operate a probationary period for teachers. In such cases, teachers will instead be managed through the school's Performance Management and Capability Procedures.

3.4.3 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 (see 5.2.2).

3.4.4 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

4. Roles and Responsibilities

4.1 The probation procedure will be operated by the employee's line manager.

4.2 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.

4.3 Any appeal against non-confirmation of appointment will be heard by the person specified in the table below.

4.4 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.

4.5 Specific roles and responsibilities

Amend/delete the table below as applicable in line with the Trust's Scheme of Delegation (SoD). More than one individual/group may appear in each box.

NB1 the "initial decisions" could lead to a non-confirmation of appointment decision therefore the decision maker must have powers of dismissal under the Trust's scheme of delegation.

NB2 it is recommended that the Trust Board has direct representation on any appeal panel in cases of non-confirmation of appointment.

**A "Panel" can be a single individual or any number of individuals from the relevant group. Specify below.

Employee	Manage procedure and make initial decisions1*	Hear appeal1
Academy Employee	Line Manager Senior Manager Head of School Headteacher CEO	Headteacher CEO LGB Panel** Trust Panel**
Trust Employee (Central Services)	Line Manager Senior Manager CEO	CEO Trust Panel**

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, Executive Headteacher, or Executive Principal.

5. The Probation Procedure

The procedure is summarised at Appendix 1.

5.1 Monitoring Performance

The employee's line manager will monitor and review performance on a day-to-day basis [and through the Performance Management process], providing feedback, direction and support on a regular basis. Managers are responsible for ensuring probation review meetings are held within the required timescales and appropriately documented.

Formal probation reviews will take place at appropriate intervals during the probation period. This will usually be at:

- 4 weeks
- 8 weeks
- Prior to the final 12-week probation end date

These meeting intervals will be adjusted as necessary for term-time only staff to reflect working-weeks.

5.1.1 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, including reasonable adjustments where appropriate for employees with a disability.

5.1.2 At any point where the employee's progress is unsatisfactory in any respect, this will be discussed with them as soon as possible – this may be outside the formal probation meetings. They will be advised verbally and in writing:

- of the areas where improvement is required;
- of appropriate training and support that has been identified;
- that failure to improve could result in termination of their employment.

5.1.3 The content and outcome of all meetings will be recorded, and a copy given to the employee for review and signing.

5.2 Final review meeting

5.2.1 Successful probation period

The final review meeting will be conducted by the decision maker specified in section 4, or where agreed by that decision maker, the line manager.

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

5.2.2 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 decision maker specified in section 4.

Prior to the meeting the line manager/decision maker will 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 documentation will also be shared with the decision maker where they are not the line manager, 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. This right will be set out in the invitation letter. Employees are responsible for making their own arrangements for their chosen companion to attend the meeting and 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.

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 meeting will be minuted and the minutes shared with employee after the meeting.

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

- confirm appointment; (See 5.2.1 above);
- extend probation; (See 6. 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 or not required to attend for work during the period of notice.

5.3 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 person or panel specified in section 4 and the Trust's Scheme of Delegation. 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 Final Review Meeting, and minutes of that 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.

6. Extensions to Probation Periods

6.1 Extensions to the probationary period will normally only be considered where:

- the employee has been absent for at least 2 weeks during the probationary period
- concerns have been identified and the employee has demonstrated some improvements but more time is necessary to assess whether they can achieve and sustain the required level of performance.

6.2 The decision to extend will usually be made at the final review meeting. The employee must consent to the extension as it represents a change to their contractual terms.

- Where the employee consents, extensions will not normally exceed 4 calendar weeks.
- Where the employee does not consent, the relevant decision maker specified in section 4 will decide whether to confirm or terminate employment.

6.4 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 or 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.

The employee will be required to sign acceptance of the extended probation period.

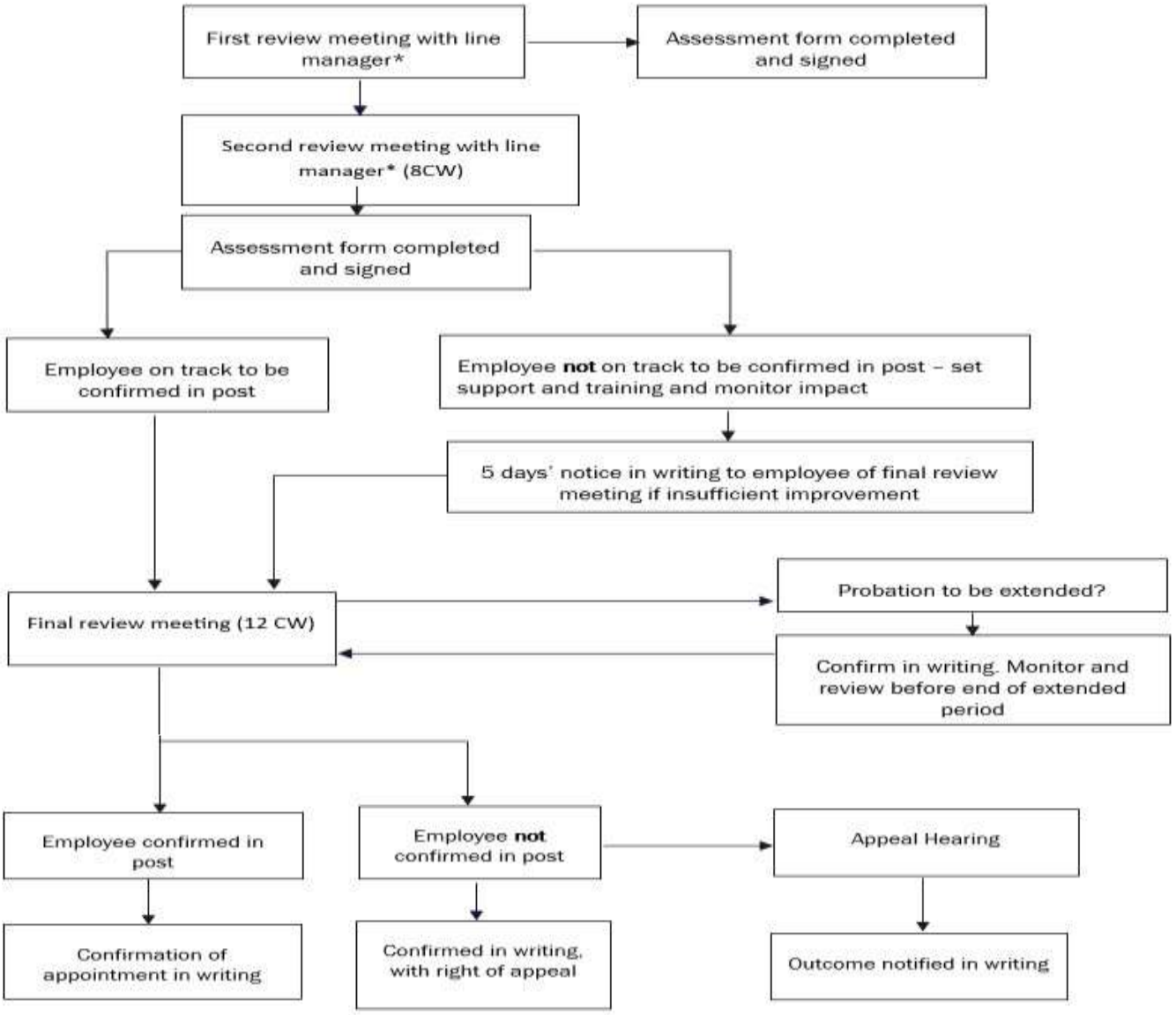
7. Records and Data Protection

7.1 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 Trust/academy processes any personal data collected during the probationary procedure in accordance with its data protection policy.

7.2 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 Trust'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 3.3 in the procedure).



PROBATIONARY REPORT	4 WEEK/HALF 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	

PROBATIONARY REPORT	8 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 Comment	
Signed (Employee)	

PROBATIONARY REPORT	FINAL: 12 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	
Where probation is not confirmed this will be confirmed in writing within 5 working days and the employee will have the right of appeal				
Is the employee's probation period to be extended?	YES		NO	

If, yes, give exceptional reasons for extension	
Period of extension (no of working weeks – not to exceed 12 weeks)	
End of extended probationary period	

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)	