



BRACKNELL FOREST COUNCIL

SUPPORT STAFF PROBATION

A Guide for Schools

Managing Probation

All employees (excluding teachers) will be required to undertake a probationary period of 6 months (unless the new starter comes to the school from elsewhere in Bracknell Forest Council). Appointment to the permanent staff will be subject to the successful completion of this probationary period.

If the 6 month probation period date passes without any formal confirmation it will be assumed that the staff member has passed their probationary period.

Headteachers/managers should be sensitive to issues of equality and diversity.

New starter

When a new member of staff is appointed standards and objectives should be set and provided to the employee to ensure expectations regarding standards of work performance, conduct and attendance are clear to them from the start. New starters should also understand they have to successfully complete a 6 month probation period.

Probation review procedure

Throughout the probation period an employee's performance and competence should be subject to assessment by their manager within a supportive and developmental context.

Regular informal one to one meetings should take place (informal notes to be taken) to ensure new members of staff are kept informed of their progress and advise them of any concerns and how these will be addressed. This will also enable staff to raise any questions they may have about work performance/training.

In addition to informal one to one meetings, formal, documented probation reviews are to be carried out during month 3 and month 6.

Below are some forms you may wish to adapt for the school for the formal probation review meetings at 3 and 6 months. It includes a list of areas that can be discussed and covered at the probation review meetings. It is important to praise good performance as well as raising any issues of concern.

No difficulties during probation

If there are no concerns during the probation period then the manager should confirm verbally at the 6 month review meeting that they have successfully completed their probationary period. This should be followed up in writing by the school

Difficulties during probation

Managers should discuss with their staff any difficulties which arise during the probation period at the time they occur rather than leaving them until the formal review meetings:

- Clarify what the difficulties are specifying how their performance/conduct/attendance is falling below what is acceptable

- Provide examples/evidence
- Allow employee to respond
- Discuss action required by employee to address the problem e.g. set target specifying an acceptable level of performance/conduct/attendance
- Identify any training needs and what support will be given to help the employee to improve
- Monitor targets
- Explain what the consequences may be if the standards are not met - that it may be necessary to discuss the matter at a formal meeting and that it could ultimately result in the employee not being confirmed in post (i.e. not passing probation period).

If there appear to be any health concerns that could be affecting performance etc. then an Occupational Health referral may be appropriate (contact School's HR for advice).

End of probationary period

When the probation period comes to an end, there are three main options:

- **To confirm the appointment**
- **To extend the probationary period** – should only be considered if it is felt the employee needs a little more time to improve. Should not be extended for more than one or two months. Probation periods should never exceed 12 months. You should not extend the probation period where it is clear that the employee will never reach the required standards. Please see template extension letter below.
- **To dismiss the employee** – during at least one of the review meetings with the individual they should have been warned that their job is at risk if they do not meet the required standards (this should be documented). The decision to dismiss should not come as a surprise to the individual (please contact School's HR if you are looking to end the contract during the probation period)

Be aware that if the decision relating to the probation period is not confirmed by the time the 6 months is up they will become a permanent member of staff.

If you decide to dismiss you will need to have a formal meeting with the individual, the individual is entitled to have a trade union rep or work colleague with them. The employee will need to be formally written to (School's HR can provide a template letter) with appropriate notice of the meeting

School's HR can attend any dismissal meeting and documentary evidence will need to be presented at the meeting. If the final decision is made to dismiss then confirmation should be given in writing and notice pay must also be paid (therefore timing of any formal meeting is key). School's HR can advise further on the dismissal process.

3 Month Probation Review Form

Line Manager:	Date: 15/02/2018
Re:	Ref:
Designation:	Location:
Date Appointed:	Due Date:
Subject:	3 Monthly Probation (Interim) Report

The above named staff member is nearing the end of their first three months in post with the XXX School.

Statement by Manager:

The above member of staff has/has not satisfactorily performed the duties of his/her post.
Comments/Observations. These are to be shared with member of staff.

Signed..... (Line Manager) Date.....

To be completed by staff member:

I can confirm that this report and its contents have been discussed with me.

Signed..... Date.....

Line Manager..... Date.....

Next meeting to be held on

PROBATIONARY REPORT CHECK LIST

Please include in your observations on the following aspects of the employee's performance when writing probation reports.

1. Time Keeping
2. Reliability
3. Health Record
4. Relationships with people
5. General approach/attitude to job
6. Performance of specific duties
7. Induction programme completed
8. Any areas where improvement required
9. Training needs
10. Progress

6 Month Probation Review Form

Line Manager:	Date:
Re:	Ref:
Designation:	Location:
Date Appointed:	Due Date:
Subject:	6 Monthly Probation (Final) Report

The above named staff member is nearing the end of their first six months in post with the XXX School.

Statement by Manager:

The above member of staff has/has not satisfactorily performed the duties of his/her post.
Comments/Observations. These are to be shared with member of staff.

Signed..... (Line Manager) Date.....

To be completed by staff member:

I can confirm that this report and its contents have been discussed with me.

Signed..... Date.....

Line Manager..... Date.....

PROBATIONARY REPORT CHECK LIST

Please include in your observations on the following aspects of the employee's performance when writing probation reports.

1. Time Keeping
2. Reliability
3. Health Record
4. Relationships with people
5. General approach/attitude to job
6. Performance of specific duties
7. Induction programme completed
8. Any areas where improvement required
9. Training needs
10. Progress

Template Probation Extension Letter

Dear

Extension of Probationary Period

I am writing to confirm the outcome of our discussions at the probation review meeting on x. Following these discussions I feel you have made some progress but I continue to have concerns about your performance in the following areas:

The following support will be put in place to assist you in improving your performance:

As a result we have decided to extend your probationary period for a further x months until x.

I do need to confirm that, if you are unable to make the required improvements during your probationary period, I may have no option other than to further extend, or bring your probation period to an end.

Please do not hesitate to contact me if you have any queries in relation to this letter.

Yours sincerely,

Manager