

# Probation Policy

Expansive Learning Group

October 2022

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<b>Author:</b>	Scott Roberts	<b>Version</b>	5	<b>Review Date:</b>	Oct 2025
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## 1. Scope

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This policy applies to all newly appointed employees, whose terms and conditions of employment state that their appointment is subject to a probationary period. This includes teaching employees, officers, professional and support employees. The length of the probation period will be stated in the terms and conditions of employment, is detailed in the relevant procedure and is dependent on the skills and competencies required for the role.

In cases where an employee has been redeployed to another role within Expanse Learning, a trial period will be a more appropriate method of ensuring that the redeployment is satisfactory to both the individual and the department. Where this situation arises guidance can be found in the Redeployment Policy and from Shared Services.

Employees on probation will not be subject to the performance review process until such time as their probation period is successfully completed. Employees who have successfully passed probation in one role at Expanse Learning who then move to a different role will not be subject to a further, formal probation process in their new role. It will still be necessary to ensure that an effective induction for the new member of staff is carried out, that objectives are set and that their performance is reviewed etc.

## 2. Policy Statement

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Expanse Learning recognises that a supportive and developmental probation process is vital in providing the appropriate level of support and training for new members of staff on commencement of their employment. The following probation procedures are available providing guidance on the implementation of the policy.

- Probationary Plan ([DatabridgeMIS Event: \(Group\) – Employee Probation Plan](#))

The relevant procedure should be read in conjunction with the policy.

## 3. Aims

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The policy aims:

- To ensure that the probation process is undertaken for all employees and is applied in a fair and consistent manner, within a supportive framework and in line with employment legislation
- To ensure Expanse Learning is provided with an opportunity to assess the skills, conduct, capability and attendance of new staff before deciding whether or not to confirm their appointment
- To identify the link between induction, probation and developmental processes and emphasise the need for all to underpin the support and development of a new member of staff

## 4. Probationary Plan

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Expanse Learning aims to secure equality of opportunity in all its activities, and in this respect, the probation process must be objective, clear, transparent, and free from discrimination. The probation process should work alongside the induction process to help create a positive and supportive working environment, allowing new employees to settle into the organisation and learn the key elements of the job within a reasonable and realistic timescale

During their probation, new employees will be made aware by their line manager of the performance standards expected of them and will be given support, training, and feedback necessary to achieve these standards. Clear, comprehensive, and accurate records of probation review meetings should be maintained, including how standards are set, what methods are used for measuring them and what timescales are given for reaching them. A Probationary Plan Form is provided for this purpose. Induction materials may be used to inform the initial probation review meeting i.e., the job description and the policies and procedures to be followed

In circumstances where problems arise during a period of probation, the line manager should raise these with the employee in a timely manner, and the employee must be given an opportunity to respond to any concerns. Line managers should discuss the action required by the employee to address the problem and where necessary give clear, unambiguous warnings if standards are not met

Employees have the right to be accompanied by a colleague or trades union representative at any formal meetings held to address serious performance issues that have arisen during probation. Documentation relating to staff will be treated confidentially and related documentation will be subject to the provisions of the Data Protection Act 2018 (DPA) as appropriate

## 5. Monitoring and review

Application of the policy will be monitored by Shared Services. This policy will be reviewed after a period of 36 months.

### Impact of non-compliance

Staff:	Disciplinary action, Support, Action Plan
Student:	Not applicable
Legislation/organisational:	statutory and non-regulated compliance. Prosecution, Staff Retention, Poor employee performance etc
Compliance lead:	Shared Services
Policy Reference:	EGL-POL-HRIM-0008
Version:	5
Agreed policy location:	DatabridgeMIS
Review Schedule:	36 months
Does the policy require Governor approval?	No

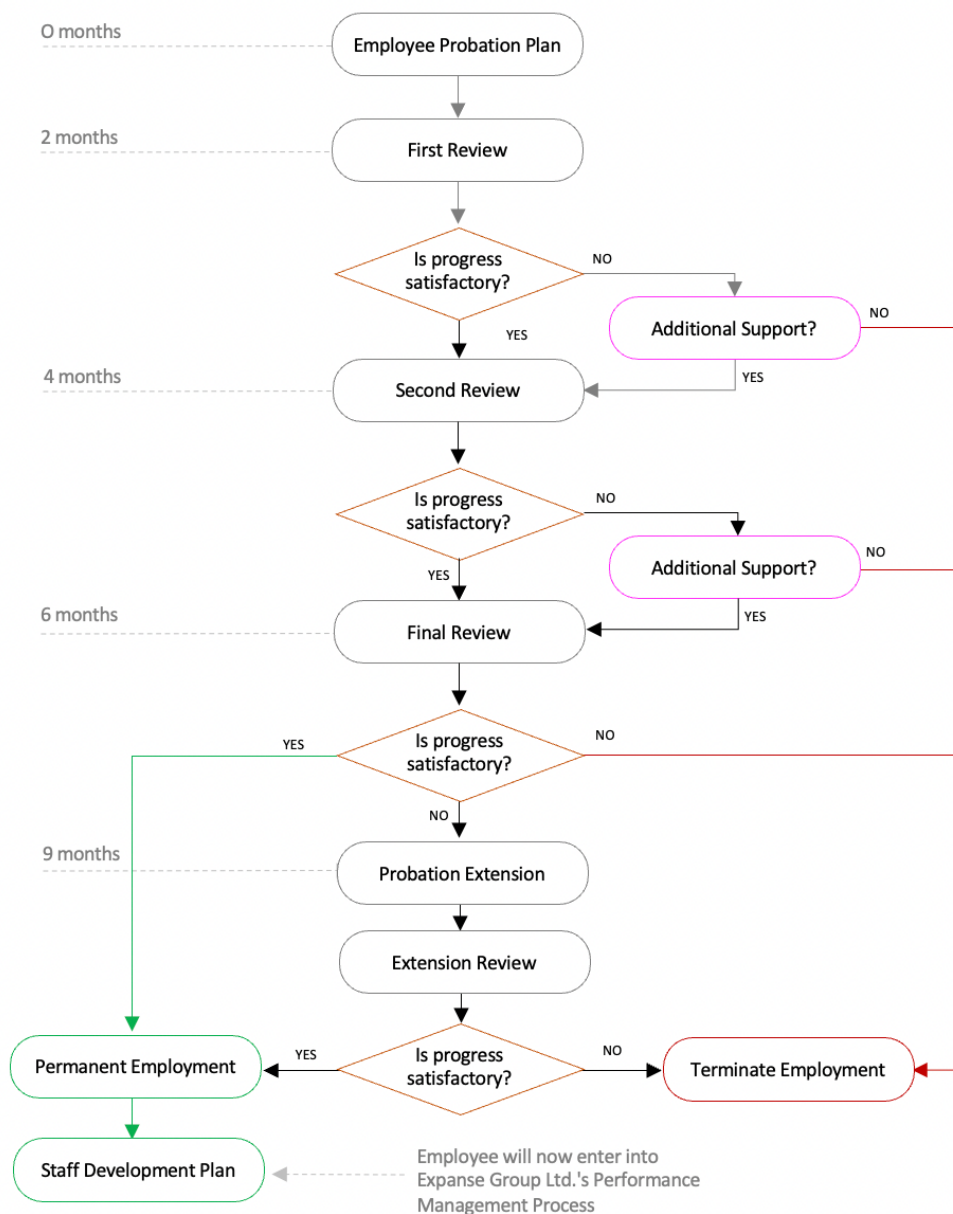
### Approval

<p>Prepared by Scott Roberts (Assoc. CIPD) 04/10/2022</p>  <p>Head of Shared Services</p>	<p>Approved by Tony Brown 05/10/2022</p>  <p>CEO</p>	<p>Counter Signatory Karl Wane 05/10/2022</p> <p>K Wane</p> <p>Director of Post 16 Education</p>
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### Version Control

Version	Date	Revision	Review Date
1	01/04/2019	First Issue	01/04/2020
2	01/09/2019	Policy review in line with strategic changes and transfer onto 2019/20 policy template.	31/08/2020
3	01/09/2020	Policy Review – Updated to include DatabridgeMIS.	31/08/2021
4	01/09/2021	Policy Reviewed	31/08/2022
5	05/10/2022	Policy Reviewed	05/10/2025

## Appendix 1 – Probation Flow Chart



**Notes:**

1. The probation plan **MUST** be completed via the DatabridgeMIS platform using the event “(Group) – Employee Probation Plan”. The plan must be shared with the Employee, and they **MUST** provide their comments using the commentary function.
2. All reviews will be scheduled by **Human Resources** and entered onto the **Office365** calendar inviting both the Line Manager and Employee
3. Prior to each review the Line Manager will liaise with appropriate supervisors and ask them to complete the Probation assessment form (Supervisor) e.g., a Teacher will complete the form for a TA, if there is no sub-level of supervision then this will not be required
4. The Line Manager will conduct each review, please note HR must be present if employment is being terminated
5. The final probation review **MUST** not exceed the 6-month period, if under exceptional circumstances this may occur the employee must be notified in writing and a rationale provided for the reason
6. An extension can only be extended on one occasion for a maximum of **3 months**. Additional support must be provided during any extension period using the action’s function.