



*Achieving together in faith*

# **Holy Cross Catholic Multi-Academy Company**

## **Probationary Policy Support Staff 2023 – 2026**

Responsible for Policy	Marina Kelly
Board Approval Date	25/10/2023
Posted on Website	08/12/2023
Date of Policy Review	October 2026

## Contents

1. Definitions.....	2
2. Introduction.....	2
3. Purpose .....	3
4. Scope .....	3
5. Managing the Probationary Period .....	4
6. Providing Support during the Probationary Period.....	4
7. Addressing Concerns During the Probationary Period .....	4
8. Terminating the Employment Before Completion of the Probationary Period .....	5
9. Terminating Employment at the end of the Probationary Period .....	6
10. Providing support for Disabled Employees.....	6
11. Application of the Probationary Period Policy .....	7
12. Final Review Meeting and Successful Completion of Probationary Period .....	8
Appendix 1 .....	9

## 1. Definitions

In this **Policy**, unless the context otherwise requires, the following expressions shall have the following meanings:

**1.1 Holy Cross Catholic Multi Academy Company (MAC)** means the Company named at the beginning of this **Recruitment Policy** and includes all sites upon which the Company is undertaking, from time to time, being carried out. Holy Cross Catholic MAC including:

- Bishop Ullathorne Catholic School
- Cardinal Newman Catholic School
- Christ the King Catholic Primary School
- St Augustine's Catholic Primary School
- St Elizabeth's Catholic Primary School
- St John Vianney Catholic Primary School
- St Thomas More Catholic Primary School
- MAC Central Team

**1.2 Holy Cross Catholic MAC** means the Company responsible for the management of the Academy and, for all purposes, means the employer of staff at the Company.

**1.3 Clerk** means the Clerk to the Board or the Clerk to the Local Governing Body of the School appointed from time to time, as appropriate. The contact details for the Clerk to Holy Cross MAC, Kirsty Russell, are: [kirsty.russell@coventry.gov.uk](mailto:kirsty.russell@coventry.gov.uk)

**1.4 Catholic Senior Executive Leader** means the person responsible for performance of all Schools and Staff within the Multi Academy Company and is accountable to the Board of Directors.

**1.5 School** means the school within Holy Cross Catholic MAC and includes all sites upon which the school undertaking is, from time to time, being carried out.

## 2. Introduction

2.1. Catholic schools aim to be places where love of one's neighbour is obvious at all times. As St. John reports, Christ said to His disciples at the Last Supper 'This is my commandment, that you love one another, as I have loved you'.

2.2. Catholic schools are staffed by teachers and support staff who are not only qualified and expert in their own field but who also, having freely chosen to

work in a Catholic institution, commit themselves to care for and support each other in every way possible consistent with the teachings of Christ, Gospel values, Catholic doctrine, and the ethos of the school.

2.3. All members of our school communities have a duty to ensure that Gospel values underpin the relationships within the school and should draw on the guidance offered in 'Christ at the Centre'. Whilst not definitive, the core values based on the Beatitudes may be summarised as follows:

- Faithfulness and integrity;
- Dignity and compassion
- Humility and gentleness
- Truth and justice
- Forgiveness and mercy
- Purity and holiness
- Tolerance and peace
- Service and sacrifice
- (Christ at the Centre 2008, Fr Marcus Stock STL MA)

2.4. Holy Cross Catholic MAC are committed to providing a positive working environment which is free from prejudice and unlawful discrimination and any form of harassment, bullying or victimisation

### 3. Purpose

3.1 The purpose of this policy is to set a clear process to assist school leaders and line managers to manage the performance and conduct of support staff during their probationary period.

3.2 The probationary review policy shall have regard to any applicable codes of practice, standards relevant to the employee's employment and as applicable to the job description and Catholic identity.

### 4. Scope

4.1 Probationary periods will be used constructively to support new employees and those commencing a new role to integrate effectively and allow the opportunity to assess whether the employee is suitable for the role.

4.2 The length of the probation will be set out in this policy and other documentation provided to the employee, such as contract of employment.

4.3 Factors that will be taken into consideration during the probationary period include performance, appraisal, skills, abilities, knowledge, attendance, punctuality and conduct. Probationary periods are also the opportunity for the member of staff to determine if the role is suitable for them.

- 4.4 The policy is for all support staff. This includes fixed term and temporary support staff. The duration of the probationary period will take into consideration the period of fixed term contract to ensure that this is fair.

## 5. Managing the Probationary Period

- 5.1 The line manager is responsible for setting objective performance standards for the employee and should discuss their expectations. Probationary review meetings, including a mid and final meeting should be held with the employee during their probationary period. If there are performance and/or conduct concerns, these need to be raised by the line manager as soon as possible, to provide the employee with the opportunity to discuss further, to respond and review the evidence. This will also effectively mutually manage expectations.
- 5.2 The line manager needs to refer to the school leader to inform them of any concerns as soon as possible, so that appropriate HR advice is provided, including about the possibility of extending the probationary period or issuing notice to terminate the contract of employment.
- 5.3 The mid and final review meetings, other management performance discussions, informal meetings and evidence, will be used to assess how the employee is progressing. This evidence will be available to discuss whether any improvements are needed for the employee to successfully complete their probationary period.
- 5.4 Support staff appointed internally to a new post or promotion are also subject to a six-month probationary period, for example when a new contract of employment is issued. The purpose of which will be to ensure that the employee is able to undertake the new role competently. Internal employees who fail probation may be subject to demotion, deployment if a suitable alternative vacancy/post is available or dismissal through the school's Capability Policy.

## 6. Providing Support during the Probationary Period

- 6.1 The line manager is responsible for providing guidance and support to the employee during the probationary period. The level of support required will differ depending on the individual employee and their new role.
- 6.2 All relevant documentation should be made available to the employee at the earliest opportunity.

## 7. Addressing Concerns During the Probationary Period

- 7.1 During the probationary period, the line manager will be continually assessing the suitability of the employee, in discussion with the school leader and reviewing their performance in line with the required standards.
- 7.2 The line manager must hold a mid-point probationary review meeting to discuss any concerns with the employee's performance and/or conduct during the probationary period.
- 7.3 When concerns are raised before or after the mid-point probationary review period, the line manager should arrange a formal meeting with the employee to discuss these. Failure to address or discuss these concerns in a timely manner could lead to the employee failing to complete their probationary period.
- 7.4 Minutes of the meeting should be made and a record of any agreed actions should be made in writing and provided to the employee. Refer to the probationary review form **(Appendix 1)**.
- 7.5 Completion of this form will ensure that all the evidence is completed throughout the probationary period and discussed with the employee.
- 7.6 The line manager may agree to extend the period of probationary period, if there are concerns, in discussion with HR. This decision must be in discussion with the employee and confirmed in writing. This includes justifiable reasons to extend the probationary period in line with the evidence and standards required **(Appendix 1)**.
- 7.7 A line manager in discussion with the school leader can agree to extend the probationary period up to a further 3 months i.e. 9 months in total. In exceptional circumstances, a period of extension up to 12 months.

## 8. Terminating the Employment Before Completion of the Probationary Period

- 8.1 The line manager may identify that the employee is unsuitable for their role and will not be able to reach the required standards with further support before the end of the probationary period.
- 8.2 When there is sufficient justifiable evidence that the required standards are not being met and are unlikely to be met, the employment can be terminated at any stage during the probationary period.
- 8.3 The line manager should discuss failure to complete the probationary period with the nominated school leader and HR.
- 8.4 If termination is agreed, then any dismissal must follow the appropriate scheme of delegation for dismissal and/or appeal and contact must be made with the Catholic Senior Education Lead (CSEL) and Chief Financial Officer (CFO), so

that appropriate arrangements can be made to terminate a contract or to consider other options.

- 8.5 The appropriate period of notice for new support staff will be in line with the contract of employment. The appropriate notice period will have interaction with continuous employment provisions where appropriate for existing members of staff commencing a new role and following promotion.

## 9. Terminating Employment at the end of the Probationary Period

- 9.1 Although being provided with support, necessary training and concerns being addressed as they arise, there may be evidence that the employee has not met the required standards of performance during or at the end of their probationary period. This includes but is not restricted to the employee not meeting performance objectives, targets, professional or other agreed standards, persistence lateness, unacceptable absence, unacceptable conduct (including up to gross misconduct), safeguarding or other concerns during their probationary period.
- 9.2 A dismissal during the probationary period is legal. Therefore, if termination of contract is agreed by the line manager in discussion with the school leader and Catholic Senior Education Leader (CSEL), in discussion with the employee, they are entitled to be accompanied at the final probation review meeting and appeal by a recognised Trade Union Representative or a workplace colleague.
- 9.3 The termination of a contract of employment with the employee, must follow the appropriate scheme of delegation for dismissals and appeals and a fair process. Contact must be made with the Catholic Senior Education Lead (CSEL) and Chief Financial Officer (CFO), so that appropriate arrangements can be made to terminate a contract.
- 9.4 The termination must include the appropriate statutory or contractual notice period, whichever is the greatest and payment of any outstanding agreed annual leave/expenses.
- 9.5 The minimum statutory notice period is one week, but only when service is one month. If the notice is more, this will be specified in the contract of employment and interaction with continuous service provisions where appropriate, for example over two years' service.
- 9.6 Pay in lieu of notice (PILON) or garden leave may be considered and agreed with the CSEL. All school property, including laptop, resources, fob etc must be returned to the line manager on the day of termination.
- 9.7 Whilst probationary employees do not have a statutory right of appeal, an appeal can be issued to the Clerk within 5 days, providing details about the points of appeal for consideration.

## 10. Providing support for Disabled Employees

- 10.1 As legally required by the Equality Act 2010, school leaders and line managers must provide additional support to disabled employees to ensure they are not subjected to unlawful or less favourable treatment during their probationary period. Reasonable adjustments must be made to remove any barriers the employee faces at work.
- 10.2 The line manager must discuss the support offered to disabled employees and reasonable adjustments during their probationary period and seek HR advice.
- 10.3 The line manager must discuss the support offered to disabled employees during their probationary period with HR.
- 10.4 Employees can expect:
- To be treated fairly and consistently
  - Any issues with performance, timekeeping, attendance and general conduct to be raised promptly by their line manager
  - Have regular meetings with their line manager to identify and address any issues that may be affecting performance at work
  - To receive training and support to help them achieve and maintain a satisfactory level of performance within an agreed timeframe
  - To be given sufficient and reasonable opportunity to demonstrate that they can maintain an acceptable level of performance.
  - To be warned of the risks of continued poor performance, timekeeping, attendance and general conduct up to and including dismissal
  - To be given a right of appeal against any formal action taken against them.

## 11. Application of the Probationary Period Policy

- 11.1 It is the school leader in discussion with the line manager responsibility to ensure that all reviews during the probationary period are diarised in advance.
- 11.2 The school leader in discussion with the line manager must ensure the formal mid-point and final probationary review meetings are held with the employee.
- 11.3 The school leader in discussion with the line manager is responsible for explaining to the new employee at the commencement of employment the standards expected by the Multi Academy and school/central team. This includes levels to be achieved by the review points and what induction, assistance and training will be given during the probationary period to ensure the employee meets the required standards.
- 11.4 Throughout the probationary review period the review form will be completed and updated with the employee. This also needs to be aligned to the appraisal policy and procedure. Appraisal and performance management reports will be taken into account in relation to the operation of the probationary period appraisal process, and other relevant HR policies as necessary.

- 11.5 The employee is required to complete Part 7 of the form (Appendix1) and may do so after consideration to the discussion held at the meeting. A record of any agreed actions should be made in writing and provided to the employee.
- 11.6 The form will then be placed on the employee's file and retained in line with General Data Protection Act (GDPA) and privacy agreement. **Managers must not pass the probationary period before the 6-month period is complete.**

## 12. Final Review Meeting and Successful Completion of Probationary Period

- 12.1 The school leader and/or line manager is required to hold a final review meeting. This will be held at least 3 working weeks before the expiry date, to accommodate any notice period, school holidays and to confirm the successful completion of the probationary period.

## Appendix 1

### Probation Review Form

PART 1 – Main Details			
Employee Name:		Employee Job Title:	
Employee job location and Team:		Continuous Service Start Date:	
Date of mid-point probationary review:		Date of final Probation review:	
Reviewer(s) Name:		Other Review Dates/meetings/Discussions	
PART 2 – Probation Review Questions		Mid-point Review	Final Review
Describe how you have settled into the new role?			
Can you confirm that we have scheduled meetings to discuss progress during your probationary period, including mid-point and final review meetings? What dates are these?			
Describe our induction programme? Is and does this continue to be useful? Can you explain any improvements, which will help improve the induction we have in place for you?			
<p>Which areas of responsibilities do you feel confident in?</p> <p>Can you describe any constructive feedback received from peers, managers, parents?, Is there any relevant evidence which supports this.</p> <p>Describe what appears to be doing well and I will also provide some feedback that we will capture on this form.</p>			

<p>Are you satisfied with the culture, ethos, type of work and role that you are carrying out</p> <p>Do you think that is in line with your knowledge, experience, skills, abilities, qualifications, values etc?</p> <p>Have you got an up-to-date job description and received a copy of our probationary period policy?</p>		
<p>Have you had an performance management meeting?</p> <p>Have you been set with clear objectives, training plan, well-being discussion and timescales to meet the standards?</p>		
<p>Describe any responsibilities, tasks you are having difficulty with?</p> <p>What about skills gaps and career aspirations?</p>		
<p>Are you considered disabled?</p> <p>Are there adequate reasonable adjustments to support you to meet the standards required?</p> <p>You are legally protected from discrimination by the Equality Act 2010 and we are committed to positive action. Are there any issues you wish to raise with me, so we can take positive action if necessary?</p>		
<p>Are you meeting the deadlines/timescales/performance objectives/tasks that you have been given?</p> <p>If not, why not?</p>		
<p>Do you have suggestions for general or specific improvements?</p>		
<p>Do you have the necessary tools and equipment you need to fulfil your role?</p>		
<p>Do you need any further training or support, such as mentoring,</p>		

coaching, shadowing, online courses, counselling etc.  Whilst we cannot guarantee coaching, we can consider mentoring and shadowing.		
Is there anything further you wish to raise with me?		
<b>Part 3 – Performance in the Role</b>	<b>Mid-point Review Score &amp; Comments</b>	<b>Final Review Score &amp; Comments</b>
<b>Performance Scores: 1 = Unsatisfactory    2 = Satisfactory    3 = Good    4 = Very Good    5 = Excellent</b>		
Absence & timekeeping		
Reliability		
Performance & pace of work		
Leadership, management, peer observations and feedback		
Knowledge, experience and skills		
Ability to work effectively with others and as part of an inclusive workplace		
Ability to be aligned to our values, your contract of employment and the Catholic identity		
Communication skills		
Safeguarding and compliance		
Training progress Performance management progress		
Overall conduct		
<b>Total</b>		
<b>Part 4 – Actions &amp; Recommendations (must be SMART)</b>	<b>Mid-point Review Comments/ Actions</b>	<b>Final Review Comments/ Actions</b>

<b>Part 5 – Line Managers comments (inc further development areas &amp; training requirements)</b>	<b>Mid-point Review Comments/ Actions</b>	<b>Final Review Comments/ Actions</b>
<b>Part 6 – Outcome of the review</b>		
<input type="checkbox"/>	The employee has successfully completed their probationary period	
<input type="checkbox"/>	The employees probationary period has been extended until <b>(date)</b>	
<input type="checkbox"/>	The employee has not met the standards required during the probationary period	
<b>Part 7 – Employee Comments (based on line managers scores &amp; comments)</b>	<b>Mid-point Review</b>	<b>Final Review</b>
<b>Employee Signature &amp; Date</b>		
<b>Line Managers Signature &amp; Date</b>		

End of probation form should be sent to the Office Manager who will confirm the outcome in writing.