



Probation Policy and Procedure

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1.0 Introduction

1.1 Our Trust wants all new colleagues to be empowered to achieve their best and to be recognised for their contributions from the start of their journey with the Trust.

1.2 Probationary periods provide an opportunity for the Trust to assess the suitability of new employees for the positions to which they have been appointed, whilst supporting new colleagues to meet the required standard of conduct and performance in their role.

1.3 Each newly appointed colleague will have a three month probationary period, during which time their line manager will implement an induction programme of training and support.

1.4 The Probationary Period Policy and Procedure is contractual, although our Trust may, at its discretion, deviate from the Induction & Probationary Procedure in exceptional circumstances.

1.6 The Probation Policy and Procedure applies to all Trust colleagues, with the following exceptions:

- any colleagues employed on casual contracts, or fixed term contracts of less than 3 months;
- colleagues transferring between academies or being promoted/stepping down to an alternate role, either within their academy or elsewhere in our Trust.

Managers of those colleagues specifically excluded from the scope of this Procedure are expected to provide Workplace Induction & support in the new role, and to assess and review their ability to reach the standards reasonably required of them in a similar way.

1.7 This Procedure will be applied with due consideration to our Trust's Equality, Diversity & Inclusion Policy and our co-operative values.

2.0 Key Principles

2.1 Appointments will be confirmed subject to the satisfactory completion of the probationary period, and/or any extension to allow for further assessment of the colleague's ability to reach the required standards of performance, conduct and attendance.

2.2 Managers will support colleagues to help them achieve the required standards by ensuring review meetings are held at appropriate points to discuss progress and identify any areas where further instruction and/or training is required.

2.3 Should the probationary period (or extended probationary period) be interrupted by a period of absence of three weeks or more during the probationary period, such as sick leave, extended annual leave, or other substantive period of paid or unpaid leave, it may be extended by an equivalent period to the period of leave at our Trust's discretion.

2.4 The Probationary Period Policy and Procedure will be executed in the review and assessment of a colleague's ability to meet the standard reasonably expected in their position with respect to performance, conduct, capability and attendance.

2.5 Where serious conduct concerns arise during the probationary period, the Trust will follow guidance and principles aligned with the Trust's Disciplinary Procedure, and where appropriate, the Trust's Managing Safeguarding Concerns & Allegations Against Staff Policy to ensure that colleagues are treated fairly and consistently, and in line with KCSIE, and referrals to external bodies are made, if required.

3.0 Probation Period Review Meetings

3.1 Over the three month probationary period, employees will have a minimum of three probationary period review meetings with their line manager. Such meetings will take place at regular intervals and be scheduled by an employee's line manager.

3.2 A summary of the main points of discussion at each review meeting and any items for action should be recorded by the manager. A copy of the meeting notes should be provided to the member of staff, and they will have the opportunity to add their comments.

3.3 During the colleague's probation period, other one-to-one meetings may also take place to 'check in' on progress.

3.4 Following satisfactory completion of the probationary period and associated meetings, a line manager will write to a colleague to confirm their appointment to the new position.

4.0 Probationary Period Extensions

4.1 The Trust's Probationary Policy and Procedure permits up to two one month extensions to a probationary period at a line manager's discretion to allow further opportunity to assess an employee's suitability for their role. Employees will receive written notification of a probationary period extension from their line manager, which will detail the line manager's reason for the extension.

4.2 As per section 2.3, a reason for extending the probation period could be absence from work.

4.3 Following notification of extension, line managers should hold a probationary period review meeting with an employee to agree an action plan to support the colleague to meet required standards during the probationary period extension.

4.4 There is no right of appeal to a probationary period extension.

5.0 Final Probationary Period Meeting

5.1 If the colleague has not reached the required standards during the probationary period, a final probationary period meeting will be convened. This meeting may take place during, or at the end of, the probationary period.

5.2 The purpose of the meeting is to discuss the colleague's ability to meet the standards reasonably required during the probationary period or extended probationary period, and whether or not their employment with our Trust should continue or be terminated.

5.3 The colleague will be notified of the details of the final probationary period meeting in writing and provided with copies of any documents that will be discussed or any witnesses that might be called at least five working days before the meeting. The colleague should submit any documents they wish to refer to or names of witnesses they might wish to call no later than two working days prior to the meeting. The colleague may be accompanied by a Trade Union representative or work colleague. An HR colleague may also be present to provide procedural advice.

5.4 The final probation period meeting will be chaired by the Headteacher, or a senior manager from the relevant service area for Trust colleagues.

5.5 If a colleague cannot attend a meeting they must inform their manager and provide an explanation as to why they cannot attend. The individual may request a rearrangement within five working days of the original date. Where a colleague fails to attend a meeting without good reason, the meeting may be held in their absence.

6.0 Appeals against dismissal

6.1 Any appeal against dismissal must be made in writing within 5 working days of receiving the written decision of the final probationary period meeting chair.

6.2 Colleagues must specify in writing the grounds on which they wish to appeal. The appeal meeting will only consider those grounds of appeal which are submitted. The appeal meeting will only consider those grounds of appeal which are submitted.

6.3 Appeals will be arranged without unreasonable delay and within 10 working days of receipt of the appeal request wherever possible.

7.0 Review

7.1 The operation of the Probationary Period Policy and Procedure, including an equality impact assessment, will be reviewed after three years. This will include the number of colleagues who have been successful, and those who have left, to review the support provided.