



# STAFF INDUCTION AND PROBATIONARY POLICY

Version 3.0

Status	Non-Statutory
Responsible committee/Individual	Trust Board/Local Governing Body
Author	CEO
Target Audience	All stakeholders
Date Policy Agreed	September 2019 – Version 1 January 2021 – Version 2 December 2022 – Version 3
Review Date	December 2023

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## Contents

	Pages
1 Introduction	3
2 Responsibilities	4
3 Probationary Procedure	5

### **Appendices**

Appendix 1 - Induction Checklist	13
Appendix 2 - Staff Induction –Declaration Form	19
Appendix 3 - First Probationary Report at 3 Month’s (performing at a satisfactory level)	20
Appendix 4 - Final Probationary Report at 6 Month’s (performing at a satisfactory level)	21
Appendix 5 - First Probationary Report at 8 Weeks (performing at a unsatisfactory level)	22
Appendix 6 - Second Probationary Report at 16 Weeks	23
Appendix 7 - Third Probationary Report at 24 Weeks	24
Appendix 8 - Probation Assessment Record – 3 Month’s Review (performing at a satisfactory level)	25
Appendix 9- Probation Assessment Record – 8 Week’s Review (performing at an unsatisfactory level)	26
Appendix 10 - Probation Assessment Record – 16 Week’s Review (performing at an unsatisfactory level)	27

## 1 Introduction

- 1.1 On behalf of the Trust, we welcome you to the Brighter Futures Learning Partnership Trust and wish you every success here. We believe that every employee directly contributes to the growth and success of the Academies and our students, and we hope you will take pride in being a member of our team.
- 1.2 All employees of the Trust are subject to the Trust's policies and procedures and it is the CEO/Headteacher's/Principal's responsibility to ensure the implementation of all policies and procedures within the Trust and Academies.
- 1.3 Brighter Learning Partnership Trust induction and probationary policy applies to all employees and, as appropriate, to volunteers and agency workers who will all receive a tailored induction programme which will include appropriate information, training, observations and mentoring. Safeguarding e-safety and the Prevent Duty will feature prominently in every induction programme The.
- 1.4 Governor induction is dealt with separately and overseen by the Trust team.
- 1.5 The first few weeks and months are vital to the success of any appointment. The arrangements made for introducing a new employee, volunteer or agency worker to the duties of the post, and to the school/UTC as a whole, provide the foundation for successful and safe contribution to the Trust. The Induction Programme is designed to help new employees, volunteers and agency workers become familiar with the requirements of their position and learn about the Trust culture, ethos and working practices effectively and efficiently so that they become knowledgeable and confident as quickly as possible. This will include access to and familiarisation with the Health and Safety and Safeguarding Policies.
- 1.6 The Induction Programme should be cross-referenced to the NQT Induction requirements for newly qualified teachers.
- 1.7 The Trust regularly reviews the performance of all new staff during a probationary period of 6 months. The arrangements made for a review of staff's performance is included in this policy.

## 2 Responsibilities

2.1 The CEO/ Headteacher/Principal is responsible for the overall management of induction, including Newly Qualified Teacher induction across the whole Trust.

2.2 Headteachers/Principal/Deputy and Assistant Headteachers/Business and HR Managers are responsible for the organisation and implementation of induction for all staff ensuring that the induction takes place.

2.3 The induction process will:

- Provide information and training on the Trust's policies and procedures
- Provide Safeguarding/Child Protection training and assess its effectiveness
- Advise staff on how to work safely, including an awareness of common-sense practice to minimise the risk of allegations against a member of staff
- Enable colleagues to contribute to improving and developing the overall effectiveness of the Trust, raising student achievement, and meeting the needs of students, parents and the wider community
- Contribute to colleagues' sense of job satisfaction and personal achievement
- Explain the Trust's Code of Conduct to ensure that all staff, volunteers and agency workers new to the Trust understand what is expected of them at the Trust and gain support to achieve those expectations
- Identify and address any specific training needs

2.4 The induction programme will include:

- An induction checklist (see Appendix 1) of the policies, procedures and training to be covered
- An induction timetable including:
  - Details of help and support available
  - Details of work shadowing, if appropriate
  - A diary of induction review meetings
- Details of other relevant individuals with responsibility for induction e.g. the designated mentor or supervisor
- Signing off induction/probation period completed or extended

2.5 The individual has responsibility, alongside their managers to ensure all items are covered. This means the individual has to monitor their checklist and raise any gaps with their manager. It is the employee's responsibility to work with key personnel in the school/UTC to ensure that they have accessed all the relevant information and policies. The inductions timeline may vary depending on the role; however, the induction will be fully completed within the first 6 months of employment.

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## 2.6 Supply Teachers, Agency Staff and volunteers

All new supply teachers and agency staff should be given appropriate induction advice, training and resources by the school/UTC. This should include:

- Safeguarding children and children protection policy and DfE Guidance on Keeping Children Safe in Education
- Health and safety
- Fire and emergency procedures
- Behaviour management policy
- Relevant information on curriculum, schedules and timetables

## 2.7 Cleaning Staff, Site, Midday and Cover Supervisors

All new staff should be given appropriate induction advice, training and resources by the Site Supervisors. This should include:

- Safeguarding children and children protection and DfE Guidance on Keeping Children Safe in Education
- Health and safety
- Fire and emergency procedures
- Specific job-related training such as manual handling, use of ladders or kitchen safety.

**In addition to the induction programme, these new staff should be given Health and Safety training before being allowed to undertake the post.**

## 3 Probationary Procedure

Within this policy the Trust sets out the requirements of a probationary process that aims to:

- Provide the opportunity to assess whether the employee is able to perform the duties of his/her job to a satisfactory level.
- To establish his/her long-term suitability for the post.

The procedure applies to all new staff employed by The Trust except NQT employees who are assessed within the process for Newly Qualified Teachers.

The first 6 months of employment will be a probationary period, during which the employee's performance will be monitored.

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The probationary period may be extended by the employer, in exceptional circumstances.

During the probationary period this employment may be terminated by either party giving one month's notice to the other in writing.

### **PURPOSE, SCOPE & PRINCIPLES**

The probationary period provides the opportunity to assess whether the employee is able to perform the duties of his/her job to a satisfactory level. The Headteacher/Principal has a responsibility to ensure that the probationer is given every reasonable facility to aid his/her performance. Reports will be prepared by the Trust which will be objective and constructive with the probationer's attention being drawn to any shortcomings with a view to an improvement being achieved.

A 6 month's probationary period will apply to all new employees regardless of whether they are full or part time.

Although the probationary procedure is only applicable to staff new to the Trust, it is good practice to review closely the work of all staff even those transferred internally, this will be achieved through performance management within the appraisal policy. This gives an opportunity to discuss progress so far, any further training needs and any concerns on either side.

It is recommended that formal probationary review meetings will be held at 3 and 6 months. **Earlier, or additional meetings may be added if there are any concerns around performance.**

Consideration must be made to those employees on term time only contracts to ensure that their review meetings take place at an appropriate time in the school/UTC term. For example, term time employees whose first 8 weeks of employment include the summer holidays, the first 3 month's review will need to be adjusted accordingly. Where the performance is satisfactory the final review will remain at 6 months, however in the case of unsatisfactory performance, reviews will be adjusted and the probationary period may need to be extended (see employees who are performing at an unsatisfactory level to see timeframe for meetings on page 8).

This procedure is to be used in addition to normal supervisory arrangements. Review meetings will simply formalise feedback on performance/conduct the employee has already received via normal supervisory and management processes.

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The probationary period can be extended in exceptional circumstances by the agreement of both the Headteacher/Principal and the employee in consultation with the Trust HR Manager. If the employee does not want an extension to his/her probationary period and his/her performance remains unsatisfactory, then his/her employment will be terminated.

All employees who are new to the Trust will have a contractual notice period of 1 month whilst in the probationary period. Upon the successful completion of the probationary period notice periods for teachers will be in line with Conditions of service for school teachers in England and Wales (Burgundy Book) and for support staff as per contract of employment. The final review will take place at a time that allows for the employee to be given 1 week's notice in the event of unsatisfactory performance, so that employment will end by the twenty-sixth week of employment. This would normally be no later than twenty weeks after appointment.

## **ROLES AND RESPONSIBILITIES**

Headteacher/Principal/Line Manager responsibilities:

- The letter of appointment to all new support staff will say that his/her employment will be subject to a probationary period of 6 months.
- The new employee's roles and responsibilities will be clearly set out (this will form part of a planned induction programme).
- Realistic and reasonable standards of performance will be set, which are consistent, and these must be explained to the new employee.
- Adequate support will be available to the employee, as well as feedback (both positive and constructive) on performance, so that he/she can reach the required standards of performance.
- Appropriate action will be taken under this procedure if performance is unsatisfactory during the probationary period. If there are concerns, these will be raised with the employee as soon as possible and not to wait until the review meetings.
- Training needs will be assessed.
- The employee will be allowed the opportunity for improvement.
- Each school/UTC will set up an internal monitoring system to ensure that the cycle of reviews and targets are in line with policy. All letters sent to employees must be approved by the Headteacher/Principal.

Employee Responsibilities:

- To be aware of the performance standards expected of them and be committed to achieving them.
- To inform his/her Line Manager/Headteacher/Principal if he/she needs additional support in order to meet the required performance standards (i.e. coaching, training and development etc).

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- To identify skills/development areas to pursue and undertake any appropriate training.

## **EMPLOYEES WHO ARE PERFORMING AT A SATISFACTORY LEVEL**

Formal reviews will, where possible be held at 3 and 6 months of employment.

### **First Review Meeting (3 months)**

The Headteacher/Principal/ Line Manager will arrange to meet with the employee to discuss:

- Employee's performance
- Key objectives, tasks and targets
- Sickness/absences
- Relationships
- Any other concerns/relevant issues
- Areas for improvement/timescales and assistance offered

The Headteacher/Principal/Line Manager will complete a probation review form, along with the probation assessment record form (**Appendix 3 and Appendix 8**) during the meeting and both the employee and line manager will be required to sign each form. A copy of the form must be placed on the employee's personnel file and a **signed** copy given to the employee.

### **Final Probationary Review Meeting (6 months)**

The Headteacher/Principal/ Line Manager must arrange to meet with the employee and follow the same process as at the 3 months' review meeting (see Appendix 4).

During this review the Headteacher/Principal/Line Manager will inform the employee of satisfactory performance and this must be confirmed in writing within 5 working days. The employee must then receive confirmation of his/her successful completion of his/her probationary period in writing, within 5 working days. After the probationary period the employee's performance will then be assessed through the Trust's appraisal policies.

## **EMPLOYEES WHO ARE PERFORMING AT AN UNSATISFACTORY LEVEL**

### **Formal First Probationary Review Meeting (8 weeks' review)**



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During the first 8 weeks of service the Headteacher/Principal/ Line manager will arrange to meet with the employee, having first highlighted that there are concerns in which case the employee may wish to bring with them a Union or Professional Association Representative or work colleague and no one else. At the meeting, the following issues must be discussed:

- Areas of poor performance or unsatisfactory conduct.
- Detail of the support that will be provided
- Time period of expected improvement
- How improvement will be assessed.

It is advisable that targets given will follow the 'SMART' target tool:

- Specific
- Measureable
- Achievable
- Realistic
- Time-bound.

The employee will be given the opportunity to explain any reasons why he/she may not be performing to a satisfactory level and will be asked what help or assistance he/she needs.

The Line Manager will complete the probation review form along with the probation assessment record form (see Appendix 5 and Appendix 9), and both the employee and line manager will sign each form. A copy of the form must be placed on the employee's personnel file and a copy will be given to the employee.

A date for the second Probationary Review Meeting will be arranged. This will take place no later than 16 weeks after the employees start date. However, the Trust will schedule informal support and monitoring meetings.

### **Formal Second Probationary Review Meeting (16 weeks' review)**

This meeting will take place no later than 16 weeks after the employee's start date. The employee is entitled to bring with them a Trade Union or Professional Association Representative or work colleague and no one else to this meeting.

### **Improved Performance**

If the employee's performance/conduct has improved to an acceptable standard and this is judged using the criteria set out at the first probationary review meeting. The line manager must record this on the probation review form, along with the probation assessment record form (see Appendix 6 and Appendix 10)

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### **Unsatisfactory Performance**

If the employee's performance/conduct remains unsatisfactory, the same procedures as stated for the first probationary review meeting must be followed. The employee must be informed in writing that if his/her conduct/performance does not improve that his/her employment may be terminated. A date for a third Final Probationary review hearing will be agreed with the employee. This will take place no later than 24 weeks after the employee's start date.

### **Third (Final) Probationary Review Hearing (24 weeks' review)**

This hearing will take place no longer than 24 weeks after the employee's start date. The employee is entitled to bring with them a Trade Union or Professional Association representative, or work colleague and no one else to this meeting. If the hearing is to consider the employee's unsatisfactory performance, the Headteacher/Principal will conduct the hearing.

### **Improved Performance**

If the employee's performance/conduct has improved to an acceptable standard and this is judged using the criteria set out at the first probationary review meeting. The Headteacher/Principal must record this on the probationary report (Appendix 7). If the performance is unsatisfactory, the Headteacher/Principal will follow the process outlined below.

### **Unsatisfactory Performance**

If the employee's performance/conduct remains unsatisfactory, the Headteacher/Principal must outline the areas of poor performance or conduct and where the employee has failed to improve. The employee will be given the opportunity to explain any reasons why he/she is not performing to a satisfactory level. The Headteacher/Principal will make a decision on whether to terminate the employee's employment. The employee will be informed verbally of the decision taken. Following the final review hearing the employee must be notified in writing of the decision taken within three days. If the decision is to terminate employment, the letter will serve the required notice on the employee and must state that the employee has a right of appeal. The notice period must be timed to ensure that employment ends before the expiry of 6 month's service.

### **Extension of Probationary Period**

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There may be occasions when it is appropriate to extend the probationary period where exceptional circumstances made it difficult to properly assess an employee's performance/ conduct e.g. extended sickness or where problems occur in the late stages of the probationary period. Wherever possible this decision should be made no later than 20 weeks after employment commenced and **in consultation with the Trust's HR Manager**.

The decision will be confirmed in writing to the employee. The letter will explain the reason/s why the probationary period has been extended, the date it has been extended to and that the employee has agreed to the extension. If the employee does not agree to the extension, the alternative is the termination of his/her employment.

An extension of an employee's probationary period will happen no more than once.

### **Serious Failure in Performance**

For cases of serious failure in performance resulting in misconduct or gross misconduct, the Trust's Disciplinary Procedure must be followed.

### **Notice Period**

Where an employee is given notice of dismissal, the Headteacher/Principal, in **consultation with the Trust's HR Manager**, may decide whether the employee will work out his/her notice period [probationary notice period will be outlined in the employment contract] or leave immediately with payment in lieu of notice. If the employee is required to work the notice period, the Trust will pay the salary. If the employee refuses to work his/her notice and no other agreement is made, the Trust is not obliged to pay the salary.

### **Fixed Term Contracts**

All employees on fixed term contracts of more than 6 months must follow the probationary guidelines in this procedure. Employees with fixed term contracts of less than 6 months will have an agreed probationary period in place which is appropriate to the duration of his/her contract. Timescales for reviews will be adjusted accordingly.

### **Right of Appeal**

If an employee wishes to appeal against the decision to terminate his/her employment, **he/she will appeal in writing to the Trust HR Manager, T Duncan [duncan.t@brighterfutureslpt.com](mailto:duncan.t@brighterfutureslpt.com)** within 10 working days of receipt of his/her termination letter.

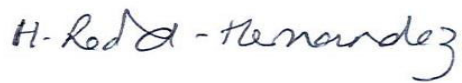
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**Review period**

This policy will be reviewed every three years, or sooner as necessary.

Policy Agreed: December 2022 (Version 3)

Signed CEO of BFLPT – Helen-Redford-Hernandez:



Date: December 2022

Signed – Chair of BFLPT – Marcus Isman-Egal:



Date: December 2022

Policy to be reviewed: December 2023

Created: September 2019 (Version 1)

Revised: January 2021 (Version 2)

December 2022 (Version 3)

## Induction Checklist

APPENDIX 1

Employee Name: -----

Job Title: -----

Manager: -----

Start Date: -----

This checklist provides details of those areas to be covered during the Trust based induction and will act as a reminder of anything missed or that needs particular attention. It is the responsibility of both management and the new starter to ensure that all relevant items are properly covered during the induction period.

Trust/core service information	Person Responsible	Resource/links	Date Completed	Comments
Welcome and introduction to the team and staff <ul style="list-style-type: none"> <li>• CEO/Headteacher/Principal</li> <li>• Admin and business manager</li> <li>• Premises /cleaning staff</li> <li>• Teachers and LSAs</li> <li>• IT Support staff</li> <li>• Other Trust staff as appropriate</li> <li>• Provide important diary dates</li> <li>• Explain the protocol and etiquette of the school/UTC</li> </ul>				

Tour of School office and facilities <input type="checkbox"/> Staff room/toilets/				
<ul style="list-style-type: none"> <li>• Location of exits/fire extinguishers</li> <li>• Fires assembly points and routines</li> </ul>				
<input type="checkbox"/> Security ID Badge Issued				
<ul style="list-style-type: none"> <li>• Building keys signed for where appropriate</li> <li>• Security systems explained</li> <li>• Other keys signed for where appropriate</li> </ul>				
<b>Trust Information</b>	<b>Person Responsible</b>	<b>Resource/links</b>	<b>Date Completed</b>	<b>Comments</b>
Brighter Futures Learning Partnership <ul style="list-style-type: none"> <li>• Who's who</li> <li>• Internet Site</li> <li>• History</li> <li>• Trust Vision</li> <li>• Future Plans</li> <li>• How does this role fit within the school and the Trust?</li> </ul>				
<b>General Organisation/ Internal Systems/Procedures</b>	<b>Person Responsible</b>	<b>Resource/links</b>	<b>Date Completed</b>	<b>Comments</b>
<input type="checkbox"/> Safeguarding Policy, including procedure for reporting issues explained				

<input type="checkbox"/> Keeping Children Safe in Education document provided				
<input type="checkbox"/> Whistleblowing policy issued, including procedure for reporting issues explained				
<input type="checkbox"/> Prevent information issued				
<input type="checkbox"/> Academies Behaviour Policy				

<input type="checkbox"/> Procedures for Children Missing Education				
<input type="checkbox"/> Staff Code of Conduct issued				
<input type="checkbox"/> Staff handbook issued including Data Protection Regulation (GDPR) absence reporting requirements explained				
<input type="checkbox"/> Equality and Diversity policy issued				
<input type="checkbox"/> Teaching and Learning policies issue				
<input type="checkbox"/> Financial responsibilities discussed / policy issued				
<input type="checkbox"/> Petty Cash explained				
<input type="checkbox"/> Expenses explained				
<input type="checkbox"/> Budgets explained				
<input type="checkbox"/> Purchasing arrangements				

<b>Terms and Conditions of Employment &amp; HR</b>	<b>Person Responsible</b>	<b>Resource/links</b>	<b>Date Completed</b>	<b>Comments</b>
<input type="checkbox"/> Contract of employment issued and T& C's discussed				
<input type="checkbox"/> Hours, Breaks, Holidays*				
<input type="checkbox"/> Method of payment/pay queries				
<input type="checkbox"/> Reporting procedures				
<input type="checkbox"/> Probationary period and period of notice				
<input type="checkbox"/> Pension provisions				
<input type="checkbox"/> HR Officer introduced				
<input type="checkbox"/> Unions / employee representatives				
<input type="checkbox"/> Absence procedure explained				

<input type="checkbox"/> Staff Counselling services				
<input type="checkbox"/> Special leave entitlement				
<b>IT</b>	<b>Person Responsible</b>	<b>Resource/links</b>	<b>Date Completed</b>	<b>Comments</b>
<input type="checkbox"/> ICT/Social Media/ E-safety policy issued				



<input type="checkbox"/> Email address and other IT software logins set up and demonstrated				
<input type="checkbox"/> Any required equipment ordered and set up				
<b>Staff Development</b>	<b>Person Responsible</b>	<b>Resource/links</b>	<b>Date Completed</b>	<b>Comments</b>
<input type="checkbox"/> Identify training needs and objectives				
<input type="checkbox"/> Safeguarding training set up				
<input type="checkbox"/> Prevent training set up				
<input type="checkbox"/> Safer Recruitment training set up*				
<input type="checkbox"/> Individual training and development plan				
<b>Health and Safety</b>				
<input type="checkbox"/> Identify delegated first aiders, fire wardens and H & S representatives in workplace				
<input type="checkbox"/> Risk assessments for safer working procedures completed				
<input type="checkbox"/> Emergency evacuation procedures				
<input type="checkbox"/> Reporting of Accidents				
<input type="checkbox"/> Health & Safety training set up				

The Job	Person Responsible	Resource/links	Date Completed	Comments
<input type="checkbox"/> Introduction to manager/senior manager				
<input type="checkbox"/> Job Description and contract of employment				
<input type="checkbox"/> Management arrangements and performance appraisal process				

\*if applicable

Signed	Position	Date	Probation period completed	Probation period extended	Date
	Manager				
	Employee				

**Signed copy to be returned to Headteacher/Principal for individual's personnel file**

**STAFF INDUCTION POLICY**

**DECLARATION FORM**

I acknowledge that I have read and understood the above policy, which was discussed through the induction process.

Signed:

Date:

**New Employee Induction and Probation Procedure**

**First Probationary Report at 3 Month's (performing at a satisfactory level)**

Employee Name: .....

Job Title: .....

Department: .....

Start Date: .....

Performance of Duties	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Timekeeping and Attendance	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Relationship with work Colleagues	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Relationships with others e.g. pupils, clients etc.	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Overall Assessment	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	

If any areas are unsatisfactory, please identify improvement required and identify any training needs.

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

Seen & understood: ..... (Probationer)      Date: .....

**PLEASE RETURN THIS COMPLETED FORM TO THE HEADTEACHER/PRINCIPAL FOR FILE**

**New Employee Induction and Probation Procedure**

Final Probationary Report at 6 Month's **(performing at a satisfactory level)**

Employee Name: .....

Job Title: .....

Department: .....

Start Date: .....

Performance of Duties	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Timekeeping and Attendance	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationship with work colleagues	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationships with others e.g. pupils, clients etc.	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Overall Assessment	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

The above named employee has satisfactorily completed their probationary period

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

Seen & understood: ..... (Probationer)      Date: .....

**PLEASE RETURN THIS COMPLETED FORM TO THE HEADTEACHER/PRINCIPAL FOR FILE**

**New Employee Induction and Probation Procedure**

First Probationary Report at 8 Weeks **(Performing at an unsatisfactory level)**

Employee Name: .....

Job Title: .....

Department: .....

Start Date: .....

Performance of Duties	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Timekeeping and Attendance	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationship with work Colleagues	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationships with others e.g. pupils, clients etc.	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Overall Assessment	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

If any areas are unsatisfactory, please identify improvement required and identify any training needs by completing Appendix 9.

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

Seen & understood: ..... (Probationer)      Date: .....

**PLEASE RETURN THIS COMPLETED FORM TO THE HEADTEACHER/PRINCIPAL FOR FILE**

**New Employee Induction and Probation Procedure**

**Second Probationary Report at 16 Weeks (Performing at an unsatisfactory level)**

Employee Name: .....

Job Title: .....

Department: .....

Start Date: .....

Performance of Duties	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Timekeeping and Attendance	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Relationship with work colleagues	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Relationships with others e.g. pupils, clients etc.	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	
Overall Assessment	Excellent	<input type="checkbox"/>	
	Good	<input type="checkbox"/>	
	Satisfactory	<input type="checkbox"/>	
	Unsatisfactory	<input type="checkbox"/>	

If any areas are unsatisfactory, please identify improvement required and identify any training needs by completing Appendix 10.

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

Seen & understood: ..... (Probationer)      Date: .....

**PLEASE RETURN THIS COMPLETED FORM TO THE HEADTEACHER/PRINCIPAL FOR FILE**

**New Employee Induction and Probation Procedure**

**Third Probationary Report at 24 Weeks**

Employee Name: .....

Job Title: .....

Department: .....

Start Date: .....

Performance of Duties	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Timekeeping and Attendance	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationship with work colleagues	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Relationships with others e.g. pupils, clients etc.	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Overall Assessment	Excellent Good Satisfactory Unsatisfactory	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

If any areas are unsatisfactory, and the necessary expectations of this post have not been met, the employee will now be informed of a decision whether or not to terminate the contract.

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

Seen & understood: ..... (Probationer)      Date: .....

**PLEASE RETURN THIS COMPLETED FORM TO THE HEADTEACHER/PRINCIPAL FOR FILE**  
**Staff Confidential**



**PROBATION ASSESSMENT RECORD – 3 MONTH’S REVIEW** (performing at a satisfactory level)

Name:

Job Title:

Date Commenced:

Date of Assessment:

Areas for Development	Identified Strengths	Fulfilling Competently

Line Manager’s Signature ..... Date .....

Employee’s Signature ..... Date .....

Headteacher’s/Principal’s Signature ..... Date .....

**Target should be SMART (Specific, Measurable, Attainable, Relevant and Time-based)**

**PROBATION ASSESSMENT RECORD – 8 WEEK’S REVIEW** (Performing at an unsatisfactory level)

Name:

Job Title:

Date Commenced:

Date of Assessment:

Areas for Development	Identified Strengths	Fulfilling Competently

Line Manager’s Signature ..... Date .....

Employee’s Signature ..... Date .....

Headteacher’s/Principal’s Signature ..... Date .....

**Target should be SMART** (Specific, Measurable, Attainable, Relevant and Time-based)

**PROBATION ASSESSMENT RECORD – 16 WEEK’S REVIEW** (Performing at an unsatisfactory level)

Name:

Job Title:

Date Commenced:

Date of Assessment:

Areas for Development	Identified Strengths	Fulfilling Competently

**Successful completion of probationary period: YES/NO**

Line Manager’s Signature ..... Date .....

Employee’s Signature ..... Date .....

Headteacher’s/Principal’s Signature ..... Date .....

**Target should be SMART** (Specific, Measurable, Attainable, Relevant and Time-based)