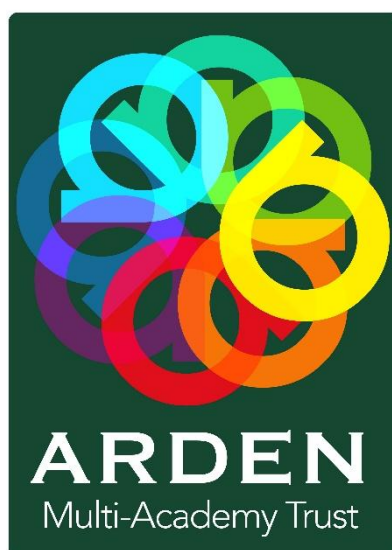




**THIS POLICY COVERS ALL ACADEMIES/SCHOOLS WITHIN
ARDEN MULTI-ACADEMY TRUST**

Name of Policy	Probation Policy	
Lead	Martin Murphy, CEO	
Governor Committee	Business & Personnel Committee	
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	September 2019 – minor amendments to reflect Trust status	
	July 2024 – minor amendments to training requirements	
	September 2025 – minor amendment to reflect that fact the where the probation period falls across an extended school holiday, the probation period may be extended.	
	June 2026 – significant amendments with the reduction of the probation period from 6 months to 18 weeks. Revised appendices too.	



Probation Policy

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1 Purpose

A successful introduction to a new job is fundamental to the creation of a productive and positive working relationship between employer and employee. This policy determines the process and principles to be adopted during the first 18 weeks in a new role (the probation period).

The policy places the onus on both the line manager and employee to productively participate in the process. It is aimed at setting up new employees for success regardless of their role or working hours.

This policy does not form part of any employee's contract of employment and may be amended at any time by Arden Multi-Academy Trust. The Trust reserves the right to review, update or withdraw this policy as required to reflect changes in legislation, operational needs or best practice.

2 Scope

This policy applies to all new employees who have a contract of employment with Arden Multi-Academy Trust, including teaching and associate staff, but excluding contractors. It does not apply to existing employees who are promoted, seconded or transferred into a different role within the Trust, unless this is expressly stated in their contract of employment or confirmed in writing before they take up the role. Where concerns arise about an existing employee in a new role, the Trust will consider the most appropriate policy or process to follow.

The policy covers the following areas:

- Performance (against role requirements and targets/objectives)
- Conduct and behaviours (including the meeting of contractual requirements)
- Compliance with policies and procedures (including any local arrangements)
- Attendance

This policy applies during the probationary period only. During this time, it will normally take precedence over the Trust's disciplinary, capability and sickness absence procedures, which will not usually apply until the probationary period has been successfully completed.

3 Principles

1. All new employees will serve a probation period of 18 weeks.
2. This policy sets out clear responsibilities for all parties to the employment relationship for the purpose of providing clarity and guidance.
3. Line managers are responsible for ensuring newly appointed employees are aware of their responsibilities, are provided with the necessary training and support and are

given regular feedback throughout the probation period.

4. Concerns regarding performance should be raised as early as possible to give maximum opportunity for the employee to rectify any problems and respond to support and encouragement.

4 Terms During Probation

During the probationary period, employees will be subject to the terms and conditions set out in their contract of employment, except where varied by this policy.

The Trust reserves the right to apply a shorter and more flexible process to address concerns relating to performance, conduct and attendance during probation, in order to reach a timely and fair decision regarding suitability for the role.

Unless otherwise stated in the contract of employment, either party may terminate employment during the probationary period by giving one week's notice. The Trust may, at its discretion, make a payment in lieu of notice.

5 Responsibilities

Employee:

- To respond to training and support put in place and input to regular reviews with their own views on how they are progressing
- To be attentive to and respond to feedback
- To comply with all reasonable requests, including attendance at meetings

Line Manager/Associate Headteacher/member of Governing Body:

- To follow the induction guidelines and put in place a structured plan to ensure the successful start to any new role
- To provide clarity on what is expected throughout the probation period alongside continuous feedback and support. To ensure that the standards and objectives set are in the context of the Performance Development and Review Framework
- To conduct meetings during the probation period in line with this policy
- To respond promptly to any issues, concerns or deterioration in performance/conduct and seek advice from HR in the event of serious concerns
- To update HR regarding completion of the probation period

Human Resources:

- To respond promptly to requests for advice or guidance from line managers
- To advise on policy interpretation and implementation as appropriate

Recognised trade union representatives or nominated work colleague:

- To accompany and advise an employee throughout any meetings called to review the probation period where requested.

Where the employee is an Associate Headteacher/ Head of School or member of the senior leadership team, responsibility for managing the probationary process and confirming outcomes will rest with the Executive Headteacher/ Director of Primary Education, CEO, Trust Board or delegated governing body, in line with the Trust's scheme of delegation

6 The standard probation process

The purpose of the probationary period is to assess objectively whether an employee is suitable for the role. Line managers are responsible for ensuring that performance, conduct and attendance are monitored closely, that expectations are clearly communicated, and that any concerns are addressed promptly. The requirement to serve a probation period of 18 weeks is explicitly stated in the contract of employment and joining documentation.

The standard probation period is 18 weeks. Regular review meetings should take place throughout this period so that the employee understands how they are progressing and has the opportunity to respond to feedback, support and guidance. The probationary period forms part of the employee's induction into the Trust and should be supported through appropriate onboarding, training and professional development.

As a guide, probation reviews should normally take place at the following points:

Stage	Timing	Purpose
Probation Period Begins		
Initial review	By week 6	To check the employee has settled into the role, understands expectations and has received appropriate induction and support. (For teaching positions, Headteachers/ Head of School or designated Senior Leader should have observed one lesson by this point).
Mid-point review	By week 12	To review progress against role expectations, conduct, attendance and objectives. Any concerns should be clearly recorded and support agreed.

Stage	Timing	Purpose
Final decision review	By week 18	To confirm whether the employee has successfully completed probation, whether further support is needed, or whether the probation period should be extended. (For teaching positions, a second lesson observation should have taken place by this point by a designated Senior Leader).
Probation Period Typically Ends.		
Probation Period Extension – Typically 4 weeks		
Extension review, if required	Up to an additional 4 weeks	To review progress during the extension period and make final recommendation.
All probation decisions, outcomes, letters and HR records should be completed by this point.		

By week 18, the employee should normally be informed whether:

- they have successfully completed their probation period;
- their probation period is being extended for a further four weeks; or
- a formal probation review meeting is required due to serious concerns.

Where probation is extended, the extension should normally be for four weeks. The extension must be confirmed in writing and should include the reasons for the extension, the improvements required, the support to be provided and the date of the extension review.

The full probation process, including any extension, outcome letters and HR notification, should be completed within 18 weeks.

Probation review meetings will normally be carried out by the employee's line manager. A Headteacher, Head of School, member of SLT, HR representative or another appropriate leader may be involved where this supports induction, reflects the nature of the role, or is needed because concerns have been identified.

Meetings held during the probation period to review progress should be development focused using the Probation Monitoring Form (Appendix 1 and Appendix 2).

A clear record should be made of each review meeting. A copy of the record should be passed to the employee and the original passed to HR so it may be retained on the employee's personnel file.

The Trust processes personal data collected during the probationary period in accordance with UK data protection legislation, its Data Protection Policy, Records Retention Schedule and relevant privacy notices.

Personal data will be processed lawfully, fairly and securely. It will only be used where necessary for employment, probation, safeguarding, legal, regulatory, HR management or associated school/Trust purposes. Personal data will only be retained for as long as necessary and in line with the Trust's Records Retention Schedule. Records relating to the probation process will be retained and disposed of in accordance with the Trust's Records Retention Schedule.

Access to probationary records will be limited to those who need the information to carry out their role. This may include relevant school leaders, line managers, HR staff, Trust leaders and, where appropriate, governors, professional advisers or external agencies.

Any inappropriate access, loss, use or disclosure of employee data must be reported immediately in accordance with the Trust's Data Protection Policy and data breach procedure. It may also be treated as a disciplinary matter and dealt with under the Trust's disciplinary procedure.

Line managers should ensure that new employees are clear about their role, objectives, responsibilities and expected standards, including expectations for both work performance and professional conduct. These expectations should be recorded, shared and supported through the relevant Trust onboarding and induction checklists, which can be personalised by schools.

It is also important that new employees understand how their role contributes to the wider aims of their department, school, and the Trust as a whole. This helps them see the purpose of their work, settle into the organisation and perform confidently in their role.

Where managers feel additional input is needed (e.g. training or personal development) they should seek assistance via either HR or the senior member of staff responsible for CPD.

Where serious concerns occur (e.g. a significant shortfall in performance, misconduct issues or a high level of absence) line managers should refer to the section "handling issues during probation". Any concerns must be recorded and shared with the employee. Appropriate action plans put in place to support an improvement in the required area.

7 How to handle concerns or issues during probation

Concerns and issues should be handled promptly and appropriate training and support given to the employee to rectify any issues.

Line managers should seek advice and support as appropriate from HR. Wherever possible issues should be resolved informally with the appropriate feedback and support being put in place.

In the event that after support and training has been given, or that a serious issue of misconduct occurs, it may be appropriate to review the continuance of the probation period. Where it is appropriate to consider extending the probation period (see guidance on this further in this policy) this should normally be for 4 weeks.

The Trust will normally seek to allow an employee to complete their probationary period in order to demonstrate their suitability for the role. However, where there is clear evidence that the employee is not suitable for the role, or that required standards are unlikely to be met, the Trust reserves the right to terminate employment before the end of the probationary period.

The probation review process outlined below should be followed (unless there are exceptional reasons why this cannot happen – in this case Human Resources should be consulted). This is separate from the regular reviews referred to earlier in this policy.

8 Misrepresentation of qualifications or experience

If, during the probationary period, it is identified that an employee does not hold the qualifications, experience or knowledge that they claimed at the point of recruitment, this will be investigated.

Where evidence confirms that information has been misrepresented, the Trust may terminate employment. In cases where this constitutes gross misconduct, dismissal may be without notice.

9 Probation review process

The following process is both structured and complies with statutory provisions (including ACAS guidelines) and should be followed where:

- A manager has sufficiently serious concerns about an employee's conduct or capability during the probation period that it is in question whether the probation period should continue;
- Following action and/or development plans an employee has failed to respond to support and training by the end of the development period;
- A conduct issue arises which places a question on whether the probation period should continue.

Where an allegation arises during probation that may amount to gross misconduct, the matter will normally be investigated and considered under this policy. Gross misconduct is a serious breach of contract and may include conduct which, in the opinion of the Trust, is likely to prejudice the Trust's reputation, seriously breach professional standards, or irreparably damage the working relationship and trust between the Trust and the employee. Reference may be made to the examples of gross misconduct set out in the Trust Disciplinary Policy, where appropriate. If allegations of gross misconduct are upheld, employment may be terminated with immediate effect and without notice or payment in lieu of notice. Any allegations relating to safeguarding will be managed alongside and in accordance with the Trust's Safeguarding and Allegations Against Staff Policy.

- Any allegations relating to safeguarding will be managed in accordance with the Trust's Safeguarding and Allegations Against Staff Policy, alongside this probation process.

Raising concerns with the employee:

- The employee should be made aware of the areas of concern at the earliest opportunity. This should be in a meeting where the concerns are discussed and evidence put forward.
- Evidence must be supported by documentation where this is relevant. The Individual should be encouraged to put forward their own point of view and any mitigating circumstances that may be affecting their performance, attendance or conduct.
- Where the manager still believes it is in question that the probation period should continue (or be confirmed) the individual will be notified that a probation review meeting is to be called.

10 Successful Probation – next steps

For associate staff, successful completion of the probationary period does not automatically result in a pay increase. However, where appropriate, pay may be reviewed in line with the relevant pay and appraisal arrangements.

Where an associate member of staff has successfully completed their probationary period by 31 March, they may be included in the pay review process for that year. Any pay review will depend on their start date, role, achievement of performance objectives, and conduct or behaviours assessed through the appraisal process.

This section does not apply to teachers, whose pay progression is managed through the relevant teacher appraisal and pay policy arrangements.

HR must be informed of the outcome of the probationary period.

11 Extending the probation period

By week 18, there should normally be sufficient evidence to decide whether the employee has successfully completed probation, whether a four-week extension is required, or whether a formal probation review meeting is needed. The total probationary period, including any extension, should normally be completed within 18 weeks. This ensures that decisions relating to confirmation of employment are made within the probationary timeframe and in line with current employment legislation.

The following are examples of when this may be appropriate:

- Following the highlighting of concerns to the employee, and a period of development, there is a realistic chance that the employee will reach the required standards by the end of an extended probation period. This would have to be evidenced by an improvement already having been identified.
- Some unforeseen absence or issue has interrupted the probation period. Examples of this may be absence from work, lack of availability of support or training.
- Where a line manager finds it necessary to extend the probationary period this should be discussed with the employee and the reasons for the extension made clear, together with clear objectives and timescales. For further guidance on extending the probation period please refer to your HR Advisor.

12 Setting up a probation review meeting

The individual should receive at least 5 working days' notice prior to the probation review meeting in writing. This letter should also include the following:

- Documentary evidence to support the decision to call a probation review meeting
- A copy of the probation policy
- An explanation of the right to be represented by either a Trade Union representative or work-based colleague

The range of outcomes from a probation review meeting include:

- Continuance of the probation period
- An extension of the probation period
- Termination of employment (with notice)
- Termination of employment (without notice, where gross misconduct is found following an appropriate process)

It may be appropriate to ask the employee to refrain from attending work (on contractual pay and benefits) between notification and the meeting itself. Whilst this does not pre-empt the outcome of the meeting, it gives the employee an opportunity to prepare themselves. Line managers should seek guidance from HR on this point.

13 Conducting a probation review meeting

- The employee's line manager's manager should hear a probation review meeting. The probation review meeting should be chaired in line with the Trust's scheme of delegation. Where dismissal is a possible outcome, HR advice must be sought before the meeting is arranged.

- Wherever possible the person chairing the meeting should be impartial and not have had any involvement in the reviews or assessments to date of the employee under probation.
- A probation review meeting should take place in a private office, with sufficient time allowed for full consideration of all the evidence and adjournments if necessary.
- Where a valid reason is given, in advance of a probation review meeting, the meeting may be rescheduled (within 5 working days of the original meeting date). In some circumstances it may be appropriate to hold the probation review meeting in the absence of the employee (e.g. in cases of unauthorised absence) – please refer to the section “Absence from or requests to postpone meetings”.
- The outcome of a probation review meeting should be confirmed in writing normally within 5 working days of the meeting. The outcome should set out the employees right of appeal against any decision made, explaining timescales and to whom an appeal should be sent.
- Where the outcome of the meeting is termination of employment (with notice) it may be appropriate to make a payment in lieu of notice.

14 Appeals procedure

Employees may appeal against a decision to terminate employment following a probation review meeting. There is no separate right of appeal against a decision to extend probation, although the employee may raise any concerns about the extension during the extended probation period and these will be considered as part of the ongoing review process. Any appeal must be submitted within 5 working days of receipt of the decision. The grounds for appeal must be clearly set out in writing.

Appeals should be heard by a manager, governor, trustee or panel with appropriate delegated authority under the Trust’s scheme of delegation. The appeal decision-maker should be more senior than the original decision-maker where possible and must have had no previous material involvement in the case.

Appeals should normally be heard within 15 working days of receipt of the written notification.

Employees have the right to be represented at an appeal meeting by a trade union representative or a work-based colleague.

The appeal hearing should be structured and allow for adjournments if necessary.

The outcome of an appeal hearing should be confirmed in writing making it clear there is no further internal right of appeal. This should occur normally within 5 working days of the hearing.

The form contained within this policy should be used for appeals (Appendix 9).

15 Absence from or requests to postpone meetings

Where an employee presents a valid reason for non-attendance at a scheduled probation review meeting it may be appropriate to reschedule the meeting. Whether it is appropriate to reschedule will depend upon the circumstances. Advice should be sought from HR in these situations. Examples of valid reasons may be:

- Non-availability of representative
- Certificated sickness absence
- Pre-booked leave

This is not an exhaustive list.

Where an individual fails to give a valid reason for non-attendance, or does not turn up for a review meeting, it may be appropriate to run the meeting in the employee's absence. This would be in exceptional cases and the opportunity to either present the case in writing, or via a representative should be offered to the employee in a letter prior to the meeting taking place where this is possible. Clearly this would not be possible in the event of a failure to turn up for the meeting.

16 Absence during the probation period

Employees who experience ill-health during probation will be offered support and where appropriate Occupational Health guidance.

Where an employee's attendance is a cause for concern this may trigger a probation review meeting, dependent upon a number of factors:

- Whether it is appropriate to obtain Occupational Health advice
- Whether it may be more appropriate to extend the probation period to give further opportunity to demonstrate the required standards (notwithstanding the guidance outlined above concerning extension of the probation period)
- Whether the employee has cooperated with policies and requirements (e.g. reporting absence, provision of medical certificates)

In circumstances where an employee's absence is ongoing and there is no evidence of a return to work at a point within the probation period to enable them to demonstrate the required standard, a probation review meeting may be called.

If the employee is not well enough to attend a meeting the opportunity to either send a written submission, or a representative exists as outlined earlier in this policy.

17 Confidentiality

The Trust will deal with matters arising under this policy sensitively and with due respect for the privacy of all individuals involved. Information relating to probation reviews will be shared only where necessary to facilitate decision-making, ensure consistency and provide appropriate support.

All employees involved in the process are expected to treat such information as confidential.

18 Handling complaints or grievances submitted during probation

Any grievance or complaint raised during the probation period will be considered seriously and managed in line with the Trust's Grievance Policy. Where the grievance is directly connected to concerns being considered under the probation process, HR advice should be sought on whether the grievance should be addressed before, alongside, or as part of the probation process.

19 Policy Review

This policy will be reviewed annually, or earlier if required, to ensure it remains compliant with legislation and reflects best practice. The Trust will monitor the application and outcomes of this policy to ensure fairness, consistency and effectiveness.



APPENDIX 1

Probation Monitoring Form for Teaching Staff

This form should be completed by the probationer's Line Manager. The original should be signed by both parties and placed on the probationer's personal file, and a copy given to the probationer.

Probationer's Name:			
Start date:			
Date of review:			
Reviewer:			
Job Title:			
Role:	Line Manager/ Headteacher/ Other		
Which review is this?			
By week 6	By week 12	By week 18	Up to 4-week extension
Standard	Standard	Standard	Extended

SECTION 1: Teaching Standards

The Teachers' Standards provide a shared professional framework to support reflection, development and consistency, helping each teacher grow in confidence, strengthen classroom practice and make a positive difference to pupils.

Teaching Standards	RAG
Part 1: Teaching	
TS1 - Set high expectations which inspire, motivate and challenge pupils.	
TS2 - Promote good progress and outcomes by pupils.	
TS3 - Demonstrate good subject and curriculum knowledge.	
TS4 - Plan and teach well-structured lessons.	
TS5 - Adapt teaching to respond to the strengths and needs of all pupils.	
TS6 - Make accurate and productive use of assessment.	

Teaching Standards	RAG
TS7 - Manage behaviour effectively to ensure a good and safe learning environment.	
TS8 - Fulfil wider professional responsibilities.	
Part 2: Personal and Professional Conduct	
Teachers must uphold public trust in the profession and maintain high standards of ethics and behaviour, both inside and outside school. This includes treating pupils with dignity, safeguarding their wellbeing, showing tolerance and respect, maintaining professional relationships and observing proper boundaries. Teachers must also have proper regard for the ethos, policies and practices of the school, and maintain high standards in attendance and punctuality.	

For reference:

Colour	Status	Meaning
Green	On track	The employee is meeting expectations at this stage of probation.
Amber	Support needed	The employee is making progress, but further support, guidance or development is needed.
Red	Concern identified	There are clear concerns that need prompt action, review and recorded support.

Key areas for discussion	
Trust specific: Adaptive planning - You plan and adapt teaching to meet the needs of the class, including pupils who need additional support or greater challenge. High expectations and challenge - You deliver ambitious teaching that challenges pupils, deepens understanding and supports strong progress. Positive professional relationships - You build respectful and productive relationships with pupils and colleagues.	

Key areas for discussion	
School specific:	

SECTION 2: 360 Review [Optional]

As part of your probation, a 360 review **may** be used to gather feedback from a range of people who work with you or are supported by your role. The purpose is to help you understand how your communication, relationships, professional conduct and impact are experienced by others. This gives you a broader view of what is going well and where further support or development may be helpful. The review is intended to support reflection, growth and a successful probation period.

Any 360-feedback gathered will be used for the purposes of probation review, support and development. Feedback will be handled confidentially and shared only where appropriate and necessary as part of the probation process.

Sources of Feedback (tick which ones have been used)			
Probationer's self-review	Line manager	Team members/ those you line manage	Peers
Relevant support staff	SLT	Students	
Feedback/ Comment:			

--

SECTION 3: SUMMARY

Are there any training or further induction requirements?

--

Are there any other topics the probationer would like to discuss during the meeting?

--

How do you feel you are progressing against your job description and the expectations of the role?

On track I feel I am meeting expectations at this stage of probation.	Support needed I feel I am making progress but would benefit from further support or guidance.	Concern identified I feel there are areas where I need to make clear improvement.

Areas to strengthen before the next review:

1	
2	

3	
---	--

Headteacher's Comments:

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Probationer's Comments:

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Declaration

I confirm that this probation review has taken place.

I understand the feedback shared during this review, including what is going well, any areas to strengthen, and any training, guidance or support that has been identified.

I understand the next steps agreed before the next review and know who to speak to if I need further clarification or support.

Probationer

Name: _____

Signature: _____

Date: _____

Line Manager

Name: _____

Signature: _____

Date: _____



APPENDIX 2

Probation Monitoring Form for Associate Staff

This form should be completed by the probationer's Line Manager. The original should be signed by both parties and placed on the probationer's personal file, and a copy given to the probationer.

Probationer's Name:			
Start date:			
Date of review:			
Reviewer:			
Job Title:			
Role:	Line Manager/ Headteacher/ Other		
Which review is this?			
By week 6	By week 12	By week 18	Up to 4-week extension
Standard	Standard	Standard	Extended

SECTION 1: Core Behaviours

These core behaviours help us recognise how each colleague contributes positively, grows in their role and supports others, while ensuring probation feels fair, encouraging and focused on shared success together.

Core Behaviours	✓
Willingness to adapt to change and changing priorities	
Treats everyone with respect, consideration and in a professional manner	
Continually evaluates own performance and seeks to improve	
Has performed basic elements of the job (the day-to-day quality and quantity of work)	
Flexibility & contribution – contributes flexibility and beyond the confines of the job	
Professional Standards – demonstrates high standards of personal and professional conduct	

SECTION 2: 360 Review [Optional]

As part of your probation, a 360 review may be used to gather feedback from a range of people who work with you or are supported by your role. The purpose is to help you understand how your communication, relationships, professional conduct and impact are experienced by others. This gives you a broader view of what is going well and where further support or development may be helpful. The review is intended to support reflection, growth and a successful probation period.

Any 360-feedback gathered will be used for the purposes of probation review, support and development. Feedback will be handled confidentially and shared only where appropriate and necessary as part of the probation process.

Sources of Feedback (tick which ones have been used)			
Probationer's self-review	Line manager	Team members/ those you line manage	Peers
Relevant support staff	SLT	Students	
Feedback/ Comment:			

SECTION 3: SUMMARY

Are there any training or further induction requirements?

Are there any other topics the probationer would like to discuss during the meeting?

--

How do you feel you are progressing against your job description and the expectations of the role?

On track I feel I am meeting expectations at this stage of probation.	Support needed I feel I am making progress but would benefit from further support or guidance.	Concern identified I feel there are areas where I need to make clear improvement.

Areas to strengthen before the next review:

1	
2	
3	

Headteacher's Comments:

--

Probationer's Comments:

--

Declaration

I confirm that this probation review has taken place.

I understand the feedback shared during this review, including what is going well, any areas to strengthen, and any training, guidance or support that has been identified.

I understand the next steps agreed before the next review and know who to speak to if I need further clarification or support.

Probationer

Name:

Signature:

Date:

Line Manager

Name:

Signature:

Date:

Appendix 3 – Week 18 Review Invitation Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes all relevant information about the meeting, possible outcomes, supporting evidence and the employee's right to be accompanied.

Dear [Name],

Invitation to probation review meeting

I am writing to invite you to a probation review meeting as you approach the end of week 18 of your probation period.

The purpose of the meeting is to review your progress during probation and consider whether:

- your probation period can be confirmed as successfully completed;
- your probation period should be extended for a further four weeks, with clear targets and support agreed; or
- further formal action is required under the Probation Policy.

The meeting will take place as follows:

Date: [Insert date]

Time: [Insert time]

Location: [Insert location]

Chair: [Insert name and role]

At the meeting, we will discuss your progress against the expectations of your role, including your job description, conduct, attendance, compliance with policies and procedures, and any objectives or support agreed during the probation period. We will also consider any relevant evidence, including previous probation review records, line manager feedback, induction records and any other relevant information.

You will have the opportunity to respond to the points discussed, share your own reflections, and provide any information you would like to be considered before a decision is made.

There is no separate right of appeal against the decision to extend probation. However, you may raise any concerns about the extension, the support arrangements or the targets set, and these will be considered as part of the ongoing probation review process.

Please find enclosed:

- a copy of the Probation Policy;
- copies of previous probation review records;
- any relevant evidence that will be considered at the meeting.

The outcome of the meeting will be confirmed to you in writing, normally within five working days.

Please confirm that you are able to attend. If you have any questions about the meeting or require any adjustments to support your attendance, please let me know as soon as possible.

Yours sincerely,

[Name]

[Job title]

[School]

Appendix 4 – Successful Completion Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes the relevant information required for that stage of the probation process.

Dear [Name],

Successful completion of probation period

I am pleased to confirm that, following your probation review meeting on [insert date], you have successfully completed your probation period.

During your probation period, your progress has been reviewed against the expectations of your role, including your job description, professional conduct, attendance, compliance with policies and procedures, and any objectives or support agreed during the induction and probation process.

Thank you for your contribution during this period. We are pleased with the progress you have made and look forward to your continued contribution to [school] and Arden Multi-Academy Trust.

You will now continue to be supported through the school's usual line management, appraisal and professional development arrangements.

A copy of this letter will be placed on your personnel file, and HR will be informed that your probation period has been successfully completed.

Yours sincerely,

[Name]

[Job title]

[School]

Appendix 5 – Four-Week Extension Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes the relevant information required for that stage of the probation process.

Dear [Name],

Outcome of probation review meeting

Following your probation review meeting on [insert date], I am writing to confirm that your probation period has not yet been successfully completed.

At the meeting, we discussed your progress against the expectations of your role, including your job description, conduct, attendance, compliance with policies and procedures, and the objectives and support agreed during your probation period.

The areas where further progress is required are:

- [Insert area for improvement 1]
- [Insert area for improvement 2]
- [Insert area for improvement 3]

Your probation period will therefore be extended by four weeks, from [insert start date] to [insert end date]. This extension is intended to give you further time and support to demonstrate the required standards for the role.

During the extension period, the following support will be provided:

- [Insert support, guidance or training]
- [Insert person responsible]
- [Insert review arrangements]

The improvements required by the end of the extension period are:

- [Insert clear target or expectation]
- [Insert clear target or expectation]
- [Insert clear target or expectation]

A further review meeting will take place on [insert date]. At that meeting, we will review your progress and decide whether your probation period can be confirmed as successfully completed or whether further action is required under the Probation Policy.

You have the right to appeal this decision. Any appeal must be submitted in writing within five working days of receiving this letter, clearly setting out the grounds for your appeal.

A copy of this letter will be placed on your personnel file and HR will be informed of the extension to your probation period.

Please speak to [insert name/role] if you need clarification about the expectations, support arrangements or next steps.

Yours sincerely,

[Name]

[Job title]

[School]

Appendix 6 – Final Review Invitation Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes all relevant information about the meeting, possible outcomes, supporting evidence and the employee's right to be accompanied.

Dear [Name],

Invitation to final probation review meeting

I am writing to invite you to a final probation review meeting following the four-week extension to your probation period.

The meeting will take place as follows:

Date: [insert date]

Time: [insert time]

Location: [insert location]

Chair: [insert name and role]

The purpose of the meeting is to review your progress during the extended probation period and consider whether you have now met the required standards for your role.

At the meeting, we will discuss your progress against the areas for improvement set out in the probation extension letter dated [insert date], together with any support, guidance or training that has been provided during the extension period.

The possible outcomes of the meeting are:

- your probation period is confirmed as successfully completed;
- your probation period is not successfully completed and your employment is terminated with notice;
- your employment is terminated without notice, where gross misconduct is found following an appropriate process.

No decision has been made at this stage. You will have the opportunity to respond to the points discussed, share your own reflections, and provide any information or evidence you would like to be considered before a decision is reached.

You have the right to be accompanied at the meeting by a trade union representative or workplace colleague. Please let me know in advance if you intend to be accompanied.

Please find enclosed:

- a copy of the Probation Policy;
- your probation extension letter;
- previous probation review records;
- any relevant evidence that will be considered at the meeting.

The outcome of the meeting will be confirmed to you in writing, normally within five working days.

Please confirm that you are able to attend. If you have any questions about the meeting or require any reasonable adjustments to support your attendance, please let me know as soon as possible.

Yours sincerely,

[Name]

[Job title]

[School]

Appendix 7 – Successful Completion After Extension Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes the relevant information required for that stage of the probation process.

Dear [Name],

Outcome of final probation review meeting

Following your final probation review meeting on [insert date], I am pleased to confirm that you have successfully completed your probation period.

At the meeting, we reviewed your progress during the extended probation period, including the areas for improvement set out in the probation extension letter dated [insert date], the support provided, and the progress you have made against the expectations of your role.

We are pleased that you have now demonstrated the required standards in relation to your role, conduct, attendance, compliance with school and Trust policies, and wider professional expectations.

You will now continue to be supported through the school's usual line management, appraisal and professional development arrangements.

A copy of this letter will be placed on your personnel file and HR will be informed that your probation period has been successfully completed.

Thank you for your work during this period. We look forward to your continued contribution to [school] and Arden Multi-Academy Trust.

Yours sincerely,

[Name]

[Job title]

[School]

Appendix 8 – Termination After Extension Template

This template is provided as a guide and may be adapted to reflect local school arrangements. Schools may use their own version, provided it is consistent with this policy and includes the relevant information required for that stage of the probation process.

Dear [Name],

Outcome of final probation review meeting

Following your final probation review meeting on [insert date], I am writing to confirm the outcome.

At the meeting, we reviewed your progress during the extended probation period. We considered the areas for improvement set out in the probation extension letter dated [insert date], the support, guidance and training provided, and the evidence available in relation to your performance, conduct, attendance and/or compliance with school and Trust policies.

After careful consideration, the decision has been made that you have not successfully completed your probation period. Your employment with [school/academy name] and Arden Multi-Academy Trust will therefore be terminated.

Your employment will end on [insert date]. You will receive [insert notice period] notice in line with your contract of employment. [If applicable: You will not be required to work your notice period and will receive a payment in lieu of notice.]

The reasons for this decision are:

- [Insert clear reason 1]
- [Insert clear reason 2]
- [Insert clear reason 3]

During the probation period, and during the extension period, the following support was provided:

- [Insert support provided]
- [Insert support provided]
- [Insert support provided]

However, the required standards for the role have not been met within the probation period.

You have the right to appeal against this decision. If you wish to appeal, you must do so in writing within five working days of receiving this letter. Your appeal should clearly set out the grounds for appeal and should be sent to [insert name/job title/email address].

You will receive any outstanding salary and payments due to you, subject to the usual deductions. You should return any school or Trust property, including [keys/access cards/laptop/ID badge/phone/other equipment], by [insert date]. Arrangements for your final pay and return of property will be confirmed separately by HR.

A copy of this letter will be placed on your personnel file and HR will be informed of the outcome.

Yours sincerely,

[Name] [Job title] [School]
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Appendix 9 – Appeal Form

Your Name:	
Your Job Title:	
Your Contact Address:	
Your Contact Telephone No:	
Union/ Representative (if known):	

DATA PROTECTION FAIR PROCESSING NOTICE

All information supplied on this form may be held and used as detailed:

The form is sent to the Chair of the school/academy Governing Body or a nominated senior manager and retained until the appeal process has been exhausted. A copy of the form will also be shared with Human Resources to ensure the appeal process is correctly followed, and with members of the appeal panel or decision-maker appointed in line with the Trust's scheme of delegation as part of a confidential 'bundle' of evidence heard at an appeal meeting, or to an employment tribunal and legal representatives should a case progress that far.

The information you provide may also be shared with relevant professional, regulatory or statutory bodies, where the Trust is legally required or entitled to make a referral.

For further information about how we use your information please refer to the AMAT's Data Protection Policy on the AMAT website.

I wish to submit an appeal against the outcome of a probation review meeting. The details of the decision I am appealing are set out below.

Decision being appealed:	Termination with notice Termination without notice
Name and role of the person who made the decision:	
Date you received the written decision:	

Grounds for appeal

Please explain why you are appealing the probation decision. You should include the reasons you disagree with the decision and any evidence or information you would like to be considered. (Continue on a separate sheet if needed.)

Declaration

I confirm that the information I have provided in this appeal form is accurate to the best of my knowledge.

I understand that the information provided will be used to consider my appeal against the outcome of the probation review meeting.

I understand that I may be asked to provide further information or attend an appeal meeting as part of the process.

Name:

Signature:

Date:
