

Induction and Probation Policy and Procedure

DOCUMENT CONTROL

Document Title	CET Induction and Probation Policy and Procedure	
Version Number	003	
Status	Approved	
Publication Date	February 2026	
Policy Owner/Author	Head of HR	
Review Date	February 2029 – or sooner if required following any changes in legislation	
Approved/Ratified by	Organisation Development Committee	Date: 09 February 2026

Please note that a record of the changes made to the original issue of this document can be found at Schedule 1 after any Appendices to the Policy/Procedure.

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1. INTRODUCTION

The induction and probation of new employees is an extension of the recruitment process. Good recruitment and selection procedures help to ensure that the best available candidate is appointed to the post but, just as important, is the integration and transition into the new role. For an individual to become embedded and effective in their new role an appropriate induction programme including the necessary support, alongside a robust probation period is essential.

2. PURPOSE

First introductions to a new role and employer are crucial for the employee to learn and gain an understanding of their role, enabling them to become effective as soon as possible and gain a sense of fulfilment and belonging to the Trust.

This policy and procedure sets out the framework for a clear and consistent induction programme and probation period for all new employees with Cumbria Education Trust.

3. PRINICIPLES

The aims of the induction and probation arrangements are to:

- Support a new employee / new in role to adjust to the job and/or new environment by providing a well-planned and structured programme of support.
- Ensure that the employee has the material and resources needed to perform effectively in their new role.
- Ensure the employee understands the vision, values, aims, and policies.
- Ensure the employee is clear about professional standards and boundaries, in particular relating to child protection and safeguarding.
- Enable managers to quickly identify and address and potential concerns or difficulties.
- Enable the managers to assess whether the employee is suitable for the role.

4. APPLICATION OF THE POLICY

- 4.1 This policy applies to all newly appointed employees of CET with the exception of those with a statutory induction period e.g. (*i.e.* ECTs).
- 4.2 The probation period reflects the contractual requirements of all newly appointed employees.
- 4.3 It is essential that the probation requirements are explained to newly appointed employees both in the offer of employment and the formal confirmation of role / issue of contract.
- 4.4 Existing employees who move into a new role should also be supporting in their transition into a new role or setting. Whilst not subject of the detailed provisions of this policy the principles of an induction and probationary period should be applied. Any concerns or underperformance will be dealt with in accordance with the appraisal and capability procedures.

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- 4.5 Whilst not directly employed all agency and supply staff should receive a basic induction into the organisation and role. Individuals undertaking longer term supply cover should be provided with clear expectations associated with the engagement and be provided with the necessary information and support to enable them to be effective in their temporary assignment.

INDUCTION AND PROBATION PROCEDURE

5. INDUCTION ARRANGEMENTS

- 5.1 Induction provides a process for new employees to learn about:
- Duties and responsibilities for the role and expectations in terms of work standards, behaviour, initial objectives, and targets.
 - How the role relates to work colleagues and their respective roles.
 - Structure of the school / academy / department and how it relates to others across the Trust.
 - The terms and conditions of their employment.
 - Workplace policies, procedures, practice, and resources.
- 5.2 It is the direct line manager's responsibility to ensure that any new employee is effectively inducted into their new role. The central team will support this process and monitor effectiveness through a range of mechanisms including direct feedback from the new employee.
- 5.3 Induction is a two way process. As a line manager your role is to help new employees settle into their new team and get to know their colleagues, managers, students etc. they will work with to become recognised and integrate naturally. Appendix 1 provides some key pointers for managers.
- 5.4 Induction provides the opportunity for new employees to ask as many questions as necessary. Managers must ensure employees have all the information they need in order to undertake their new role successfully and identify initial learning needs and how they will be met. In particular this must include:
- Health and safety procedure and practice
 - Safeguarding
 - Special Educational Needs
 - Emergency procedures
 - Equality / Code of conduct
 - Data protection
 - Basic housekeeping information e.g., ID, Uniform, IT, facilities, site tour
 - Basic HR processes – pay / absence / HR policy and procedures
 - Vision and values
 - Priorities for the new role
 - Team introduction / key contacts

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- Trust procedures

- 5.5 Any new employees should receive a thorough induction to ensure they are able to perform effectively in their new role. An induction checklist is maintained by the Trust which covers the main elements of induction. This should be expanded by each setting to meet their specific requirements relevant to their site and role.
- 5.6 In order to effectively integrate the new employee, the induction programme should be delivered gradually over the employees' first month. However, it is important to recognise that in reality it will take a longer period for a new employee to become embedded and perform to their full potential.
- 5.7 It is essential that the induction programme leads into an effective probationary period with sufficient review and support provided to facilitate a successful transition into the new role.

6. PROBATION ARRANGEMENTS

- 6.1 An effective probation allows a trial period during which the line manager should ensure the new employee receives relevant opportunities to learn and develop in their new role.
- 6.2 Probation is a two-way process and provides the line manager with an opportunity to appraise the new employee's aptitude, knowledge and conduct whilst assessing their suitability to undertake the new role.
- 6.3 An effective probation period will be underpinned by a probation agreement which sets out how performance of new employees will be monitored and reviewed in relation to:
- Quality of work and understanding of role
 - Attitudes and motivation
 - Conduct and attendance
 - Compliance with all policies and procedures, particularly those relating to safeguarding and promoting the welfare of children and young people
 - Health and safety
 - Providing formal feedback and opportunity for discussion
 - Identifying appropriate training, support, and assistance
 - Reinforcing the Trust's Vision and Values and inclusive culture.
 - Dealing with inadequate performance and misconduct issues.
- 6.4 The probation period must be underpinned by regular and ongoing dialogue between line managers and their employees. Feedback and discussion regarding performance and standards should be embedded in day-to-day management and not only through formal reviews under the probation arrangements.
- 6.5 Probation is a period of 6 months from the date of commencement in the new role.

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The line manager should, in normal circumstances conduct a total of 3 formal reviews with the probationer. Reviews should take the form of a confidential meeting between the manager and probationer, in which there is opportunity for two-way discussion.

The probation reviews are structured as follows:

TIMESCALE	PURPOSE
During Induction	Set and agree the Probation agreement following on from the original induction programme.
Within 1 month post commencement	To establish objectives for the remaining 5 months and identify any settling in issues that require support / resolution.
Within 3 months post commencement	Monitor progress and record achievements and any areas which require ongoing support – highlighting any areas of concern and provision of an informal support plan where necessary.
Within 5 months post commencement	To formally assess and record completion of probationary objectives, or to trigger consideration of continued employment due to inability to meet requirements of the role.

6.6 Probation Agreement

The requirements of the role and specific performance targets will have been outlined to the new employee during the recruitment and induction processes. This will incorporate as a minimum employee's job description/person specification including any leadership responsibilities.

The line manager should inform the employee of the following:

- Job and specific performance targets they will be expected to achieve, and which the employee's performance will be measured against.
- Planned training/development which will support the employee's performance.
- Planned meetings/discussions to review the employee's progress.

This will be documented in a probation agreement and will establish a baseline against which to measure the employee's progress throughout the probation period.

6.7 The First Review: On completion of one month's service.

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The purpose of this meeting is for the line manager to evaluate the probationer's performance and discuss any key issues with the probationer. If improvements in performance are required, there should be a discussion about how to make the necessary improvements, including appropriate management support/training.

The detail of any performance assessment will vary dependent upon the level of skills and competencies required to perform the job effectively, and the number of targets that the employee has been set. Listed below are some examples of potential sources from which line managers could make an assessment on an employee's performance:

- Direct observation
- Completed work/targets
- Work/targets in progress
- Colleague feedback
- Team meetings
- Customer feedback
- Third party observations (where appropriate)

Whilst assessing, line managers should:

- Be objective
- Recognise achievement
- Highlight areas that require improvement

Upon completion of this review meeting, the line manager should complete Form A (Appendix 2). This should then be signed by the line manager and the probationer. A copy should be given to the individual and a copy saved on the probationer's personnel file.

6.8 The Second Review: On completion of 3 months' service

The purpose of this meeting is to review the probationer's performance over the first 3 months. Where the previous review indicated that improvements in performance were required, the second review meeting should be used to consider the extent of any improvement that may have taken place.

Where the probationer has not met the required standards, they will be informed that continued failure to meet those standards may result in dismissal.

Upon completion of this meeting, the line manager should complete Form B (Appendix 3). This should be signed by the line manager and the probationer, and a copy should be given to the individual and a copy saved on the probationer's personnel file.

6.9 The Final Review: On completion of 5 months' service

Prior to the final review meeting, which normally takes place after the probationer has completed 5 months' service, the line manager should consider whether:

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- The probationer's appointment should be confirmed.
- The probationary period should be extended because there are exceptional circumstances.
- The probationer will be dismissed with statutory or contractual notice, whichever is the greater.

Where a dismissal is a possible outcome of the review meeting, the following will be undertaken by the line manager:

- The probationer will be written to with details of the date, time, and purpose of the review meeting.
- The letter will state reasons why the performance has been unsatisfactory to date.
- The probationer will be notified in writing of their right to be accompanied at the meeting by a workplace colleague.
- Where a dismissal may result, the probationer will be notified of this in writing and arrangements made for the Headteacher to conduct the meeting.

Upon completion of the final review meeting, if the probationer has passed the probationary period, then the line manager will complete Form C (Appendix 4). This will be signed by the line manager and the probationer. The form should be placed in the probationer's personnel file with a copy provided to the individual.

If a recommendation is made by the line manager to dismiss, there will be a formal meeting with the Headteacher at which the Headteacher and the probationer, who may be accompanied by a trade union representative or a work place colleague, will have the opportunity to state their case, before any decision is made by the Headteacher concerning their employment.

The Headteacher will write to the individual confirming the decision. There is a right of appeal against a decision to terminate employment. Any appeal will be heard in accordance with the Trusts Scheme of Delegation.

Where the recommendation by the line manager is the Headteacher the matter will be referred to the next level of senior management for consideration.

6.10 Concerns During the Probationary period

Where concerns become apparent, they will be raised at the earliest opportunity with the aim of supporting the employee to improve their performance. This will include:

- The areas where performance improvement is required and targets to be met.
- The employee's view about their performance in the role.
- Appropriate training, support or coaching to help the Employee meet the required standards.
- Timescales for improvement and arrangements for further monitoring / meetings.
- Whether an extension of the probationary period is appropriate.

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The employee should also be made aware that should the required improvements not be made their employment may be terminated within the probationary period.

Additional meetings may be arranged to assist with the support and monitoring of the employee as they work towards addressing these concerns.

6.11 Extending the Probationary Period

If, during or towards the end of the probationary period and despite addressing the concerns with the employee, there remain areas where performance remains unsatisfactory – the probation period may be extended.

An extension may not be appropriate in all circumstances but may be considered where:

- It is felt that an employee will be able to meet the expectations of the role within an extended period.
- Where an employee has demonstrated genuine progress towards meeting the standards expected.
- Where an employee is awaiting further training which is key to the performance of a role.
- Where absence has meant that it has not been possible to adequately assess the employee's performance.

The period of extension will depend on the circumstances of the case but will not usually exceed a further 3 months.

Any extension to the probationary period will be confirmed in writing. This notification will include:

- The duration of the extension.
- The reasons for the extension.
- Details of the further improvements required.
- Arrangements for monitoring and review.

The employee should also be aware that should the required improvements not to be made their employment may be terminated within the probationary period.

A final review meeting will take place towards the end of the period of extension where the final assessment of suitability will be made. This meeting will take place in accordance with the final review meeting section above.

6.12 Terminating Employment During the Probationary Period

In the circumstances where an employee's performance remains unsatisfactory consideration may be given to termination of employment.

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Where this is the outcome of the probation process the employee will be provided with one month's notice in accordance with their contractual terms.

6.13 Disciplinary Issues Arising During The Probation Period

The Trust's Disciplinary Policy does not apply to probationers. Instead, the following procedure will apply where issues of alleged misconduct arise during the probation period.

Where allegations have been made against a probationer, a management investigation will be conducted into the matter. In cases of alleged serious misconduct, the Headteacher will normally suspend the probationer pending an investigation and any subsequent hearing.

If, as a result of this investigation, there is found to be a case to answer, the probationer will be invited to a meeting with the line manager or other nominated member of the management team.

The purpose of this meeting is for the manager to consider the allegations, question the probationer (and any witnesses if relevant) and reach a decision based on the balance of probability. As a result of this meeting, the manager may:

- Find that the allegations are unsubstantiated and that no further action is necessary.
- Issue a written or final written warning.
- Recommend to the Headteacher that the probationer is dismissed.

If the manager decides to recommend to the Headteacher that the probationer is dismissed, then the following preparation will be undertaken by the manager:

The probationer will be written to with details of the date, time, and purpose of the disciplinary hearing.

- A copy of the investigation report will be enclosed.
- The probationer will be notified in writing of their right to be accompanied at the hearing by a workplace colleague or a trade union representative.

If the Headteacher decides to dismiss the employee has the right of appeal. Any appeal must be lodged within 5 working days of receipt of the decision letter and must state the reasons for the appeal. In cases where gross misconduct has been substantiated dismissal may be summary; i.e. dismissal without notice and pay in lieu of notice.

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APPENDIX 1

Before an employee's first day

Workspace:

- ☐ Prepare your new employees work area and space and equip it with supplies
- ☐ Order appropriate access keys / security fobs and ID cards and make sure they work
- ☐ Arrange for parking if required.
- ☐ Give them any information about working arrangements.

Technology Access:

- ☐ Order technology equipment (laptop etc) and software access.
- ☐ Set up their system in advance and assign them to a printer.
- ☐ Arrange access to common drives.
- ☐ Add their name to relevant email lists

General Communications:

- ☐ Share the news about the new starter with everyone in the school and the wider Trust as necessary so everyone is aware of their introduction.
- ☐ Assign a buddy or a mentor the new employee can rely on to show them the ropes and answer their questions .

Embarking on your employee's induction journey

First Day:

- ☐ Have a welcome card waiting for them from the team.
- ☐ Give them a tour of the workplace and introduce them to key team members including any senior leaders.
- ☐ Give them key school information (handbook) and time to complete the checklist over the week ahead.
- ☐ Meet with them (and their manager) to explain the expectations of their role. They need to know what they are supposed to be doing, and how that contributes
- ☐ Assign them any simple tasks.
- ☐ Ensure they have lunch with their manager, buddy or mentor.

First Week:

- ☐ Introduce them to colleagues from different schools / areas of the Trust and have them shadow if possible so they can experience other areas of the school / Trust if possible / appropriate.
- ☐ Ensure they have worked through the induction checklist and have accessed, read, and acknowledged any key policy and procedures.
- ☐ Check in with them regarding any first tasks.

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Embarking on your employee's induction journey

First Month:

- ☐ Hold regular check-in meetings and evaluate their progress in line with the probation procedure.
- ☐ Check how they are getting along with the rest of the team and whether they are enjoying their work.
- ☐ Assess and action training needs.

Common Pitfalls

- ☐ Not following up with a new starter in the lead up to their first day.
- ☐ Not being prepared for the induction.
- ☐ Overloading your new starter with information.
- ☐ Handing them a mountain of paper.
- ☐ Impersonal experiences during the induction
- ☐ Not introducing them to the team or wider Trust.
- ☐ Assuming they understand our common language and acronyms.
- ☐ Not asking for feedback.
- ☐ Not setting out clear responsibilities.
- ☐ Assuming that development needs cease at the end of the probation period.

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APPENDIX 2

PROBATION / PROGRESS REVIEW – ONE MONTH

This form should be completed by the end of month one between the line manager and the employees in accordance with the procedure. The original should be placed on the employee's personnel file and a copy retained by the employee.

FIRST REVIEW – end of month one

Employees name:	
Start date:	
Job title:	
Date of review meeting:	
Line Managers name and job title:	

Probation Assessment / Commentary:

Is the employee happy that all of the topics within the induction have been fully covered	YES	NO
Detail any topics which have either not yet been covered or fully understood. Outline any remedial action required and timescales.		
Have any immediate training or development needs been identified?	YES	NO
If so, please detail how these will be addressed.		
Detail any issues or concerns which have been raised by the employee during month 1. What action has / will be taken to address these?		

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Is the employee clear about what their new role entails and how they contribute to the work of the Trust / School / Dept?	YES	NO
Outline any areas requiring further clarification and how this will be achieved.		
Has the employee started to develop effective working relationships with colleagues, management, wider school (parents / community) – identifying any positive or any areas for improvement.	YES	NO
Outline and action required and timescales		
Outline the areas in which the employee is performing well.		
Are there any identified areas for improvement or concern?	YES	NO
Please provide examples and detail the support which is being put in place to address any shortfall.		
What are the key objectives for the employee between now and the completion of their probationary period? Detail how they will be supported to achieve these and how success will be measured. (MAX 3)		
Detail specific training and development provided to date – What additional training, development or support is required to deliver the required performance / achievement of key objectives?		

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Are there any concerns about the employees attendance – punctuality, reliability, or absence?	YES	NO
If yes, outline these and how they will be addressed.		
Are there any Health, Safety or Wellbeing matters?	YES	NO
If yes outline these and how they will be addressed.		
Are there any equality, diversity, or inclusion matters?	YES	NO
If yes outline these and how they will be addressed.		
Line Manager General Comments:		
Employee General Comments:		

Sign off:

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I confirm that the 1st formal review has been satisfactorily completed

☐

Or

I confirm that I have informed the employee where there is a shortfall in the standards required of them and that failure to improve may impact on confirmation in post. I have set targets for improvement to be achieved by the 2nd formal review at the end of the month 3 of employment.

☐

Or

Formal review only – probationary period not applicable due to previous continuous service

☐

Line Manager:

Provisional date for Review 2:	
Signed	
Print Name	
Date	

Employee:

Signed	
Print Name	
Date	

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APPENDIX 3

PROBATION / PROGRESS REVIEW – THREE MONTH

This form should be completed by the end of month three between the line manager and the employees in accordance with the procedure. The original should be placed on the employee's personnel file and a copy retained by the employee.

SECOND REVIEW – end of month three

Employees name:	
Start date:	
Job title:	
Date of review meeting:	
Line Managers name and job title:	

Probation Assessment / Commentary:

If the induction topics were not previously signed off, have all outstanding induction topics now been fully covered and understood?	YES	NO
Detail any topics which remain outstanding and outline any remedial action required together with associated timescales.		
Detail any issues or concerns which have been raised by the employee since their last review. What action has / will be taken to address these?		
Is the employee positively contributing to the work of the Trust / school / dept?	YES	NO
Outline any areas requiring further clarification and how this will be achieved.		

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Outline the areas in which the employee is performing well and areas of strength including any key achievements.		
Are there any identified areas for improvement or concern?	YES	NO
Please provide examples and detail the support which is being put in place to address any shortfall.		
What progress has been made against the key objectives set for the employee? Detail how they will be supported to achieve these and how success will be measured. (MAX 3)		
Provide the detail of any additional training, development or support required to achieve the improvements or key objectives?		
Are there any concerns about the employees attendance – punctuality, reliability, or absence?	YES	NO
If yes, outline these and how they will be addressed.		
Has the employee formed positive working relationships with colleagues, management, wider school etc... Outline any areas of strength or improvement.		
Are there any Health, Safety or Wellbeing matters?	YES	NO

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If yes outline these and how they will be addressed.		
Are there any concerns regarding the management of workload or work/life balance?	YES	NO
If yes, outline these and how they will be addressed.		
Are there any equality, diversity, or inclusion matters?	YES	NO
If yes outline these and how they will be addressed.		
Does the employee feel able to raise any concerns or to challenge inappropriate behaviour?	YES	NO
If no, detail how this will be addressed.		
Are there any outstanding issues to address which may impact of successful completion of the probationary period?	YES	NO
If yes, please outline these issues and detail any agreed support plan including detail of timescales for improvement and monitoring arrangements.		
Line Manager General Comments:		

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Employee General Comments:

Sign off:

I confirm that the 2nd formal review has been satisfactorily completed

☐

Or

I confirm that I have informed the employee where there is a shortfall in the standards required of them and that failure to improve may impact on confirmation in post. I have set targets for improvement to be achieved by the 3rd formal review at the end of the month 5 of employment.

☐

Or

Formal review only – probationary period not applicable due to previous continuous service

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Line Manager:

Provisional date for Review 3:	
Signed	
Print Name	
Date	

Employee:

Signed	
Print Name	
Date	

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APPENDIX 4

PROBATION / PROGRESS REVIEW – FIVE MONTH

This form should be completed by the end of month five between the line manager and the employees in accordance with the procedure. The original should be placed on the employee's personnel file and a copy retained by the employee.

FINAL REVIEW – end of month five

Employees name:	
Start date:	
Job title:	
Date of review meeting:	
Line Managers name and job title:	

Probation Assessment / Commentary:

If the induction topics were not previously signed off, have all outstanding induction topics now been fully covered and understood?	YES	NO
Detail any topics which remain outstanding and outline any remedial action required together with associated timescales.		
Detail any issues or concerns which have been raised by the employee since their last review. What action has / will be taken to address these?		
Is the employee positively contributing to the work of the Trust / school / dept?		
YES		
NO		
Outline any areas requiring further clarification and how this will be achieved.		

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Outline the areas in which the employee is performing well and areas of strength including any key achievements.		
Are there any identified areas for improvement or concern?	YES	NO
Please provide examples and detail the support which is being put in place to address any shortfall.		
What progress has been made against the key objectives set for the employee? Detail how they will be supported to achieve these and how success will be measured. (MAX 3)		
Provide the detail of any additional training, development or support required to achieve the improvements or key objectives?		
Has the employee formed positive working relationships with colleagues, management, wider school etc... Outline any areas of strength or improvement.		
Are there any concerns about the employees attendance – punctuality, reliability, or absence?	YES	NO
If yes, outline these and how they will be addressed.		
Are there any Health, Safety or Wellbeing matters?	YES	NO

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If yes outline these and how they will be addressed.		
Are there any concerns regarding the management of workload or work/life balance?	YES	NO
If yes, outline these and how they will be addressed.		
Are there any equality, diversity, or inclusion matters?	YES	NO
If yes outline these and how they will be addressed.		
Does the employee feel able to raise any concerns or to challenge inappropriate behaviour?	YES	NO
If no, detail how this will be addressed.		
Are there any outstanding issues to address which may impact of successful completion of the probationary period?	YES	NO
If yes, please outline these issues and detail any agreed support plan including detail of timescales for improvement and monitoring arrangements.		
Line Manager General Comments:		

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Employee General Comments:

Sign off:

I confirm that the final formal review has been satisfactorily completed.

☐

Or

I am unable to confirm the probationary period has been satisfactorily completed. Due to exceptional circumstances I have decided to extend the employee's period of probation. I have informed the employee where there is a shortfall in the standards required of them and that failure to improve may impact on confirmation in post.

☐

A further final review meeting will be held on:

Or

I am unable to confirm that the required standards have been met by the employee during the probationary period. I have advised the employee that they have been unsuccessful and that the recommendation will be made that their employment be terminated.

Or

Formal review only – probationary period not applicable due to previous continuous service

☐

Line Manager:

Provisional date for Review 3:	
Signed	
Print Name	
Date	

Employee:

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Signed	
Print Name	
Date	

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SCHEDULE 1

DOCUMENT CONTROL – RECORD OF CHANGES

Version Number:	Publication Date:	Nature of, and Reason for, Change(s)
001	September 2020	Reviewed no changes required.
002	September 2021	Reviewed no changes required.
003	November 2024	Reviewed with induction incorporated with inclusion of teachers reflecting contractual requirements.
---	February 2026	Reviewed and no amendments required.

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