

Girls' Learning Trust

Manager Guide - Probationary Review Process

Owner: HR

Date: August 2024

Purpose: To provide line managers with guidance regarding the process that should be followed in relation to the probationary process for all permanent teaching and support staff.

1. Scope

1.1 The process outlined below applies to all permanent teaching and support staff only.

1.2 It does not apply to the following staff:

- Fixed-term contracts - due to the varying nature of fixed-term contracts, staff on these types of contracts are subject to less structured probationary periods (please speak with a member of the HR team for advice).
- ECTs – specific employment contracts are in place for ECTs which include the completion of a two-year managed induction period.
- Casual worker contracts (i.e. invigilators).

2. Purpose

2.1 The purpose of the probationary review meeting is to:

- Ensure that staff possess the skills and competencies required of the role.
- Listen to feedback from staff to ensure they are given every opportunity to maximise their potential and succeed in their role.
- Identify any appropriate training and development needs.

3. Process

Information	Teaching Staff Process	Support Staff Process
Length of probationary period (enshrined in employment contracts):	26 weeks (inclusive of any school closure period).	6 months (26 weeks)
Extension to probation:	May be extended following consultation with a senior leader and HR.	
Review Meeting Process:	1. Review 1: Conducted by Line Manager within first 6-8 weeks using template form (provided by HR). If review coincides with appraisal this should form part of the appraisal discussion.	1. Review 1: Conducted by Line Manager within first 6–8 weeks using template form (provided by HR). If review coincides with appraisal this should form part of the appraisal discussion.

	<div>2. Review 2: Conducted by Line Manager between 16 – 18 weeks of employment using template form.</div> <div>3. Final review: Conducted by senior leader between 22 – 26 weeks.</div>	<div>2. Review 2: Conducted by Line Manager between 16 – 18 weeks of employment using template form.</div> <div>3. Final review: Conducted by senior leader between 22 – 26 weeks.</div>
Method of Assessment:	<div>The following should feed into the probationary review meetings:</div> <div><div>▪ Lesson observations</div><div>▪ Departmental Reviews</div><div>▪ Any feedback received</div></div>	<div>The following should feed into the probationary review meetings:</div> <div><div>▪ Informal observation</div><div>▪ 121 meetings</div><div>▪ Any feedback received</div></div>
Competencies being assessed:	<div><div>▪ Adherence to Teachers’ Standards</div><div>▪ Quality of work</div><div>▪ Reliability of work</div><div>▪ Meeting deadlines</div><div>▪ Working relationships</div><div>▪ Attendance and timekeeping</div></div>	<div><div>▪ Quality of work</div><div>▪ Reliability of work</div><div>▪ Meeting deadlines</div><div>▪ Working relationships</div><div>▪ Attendance and timekeeping</div><div>▪ Achievement against any tasks or objectives.</div></div>
Capability Concerns:	<div>Where the line manager identifies any areas for development or specific concerns with the individual’s performance, this should be raised within the probationary review meetings with reasons for underperformance explored and constructive feedback provided regarding how performance can be improved and expectations should be provided.</div> <div>Line managers should speak with their senior leader and / or a member of the HR team for support where this might be the case.</div>	
Responsibilities		
Line Manager	<div><div>▪ Set expectations and objectives as necessary.</div><div>▪ Monitor performance.</div><div>▪ Conduct review meetings 1 and 2.</div><div>▪ Collate feedback from any lesson observations.</div><div>▪ Escalate to member of the SLT and HR where any concerns identified.</div></div>	<div><div>▪ Set expectations and objectives as necessary.</div><div>▪ Monitor performance.</div><div>▪ Conduct review meetings 1 and 2.</div><div>▪ Escalate to member of the SLT and HR where any concerns identified.</div></div>
Member of senior leadership team (Assistant Headteachers, Deputy Headteachers, Headteachers and Shared Services SLT).	<div><div>▪ To meet with line manager to identify progress and any performance concerns.</div><div>▪ Conduct final review meeting.</div><div>▪ To ensure HR are notified of progress.</div></div>	<div><div>▪ To meet with line manager to identify progress and any performance concerns.</div><div>▪ Conduct final review meeting.</div><div>▪ To ensure HR are notified of progress.</div></div>

HR	<ul style="list-style-type: none"> ▪ To ensure probationary period is set on Every HR and relevant managers are notified of review dates. ▪ To be informed if there are concerns regarding performance. ▪ To be involved where any decision is made to extend or terminate the employee's employment. ▪ To support final review meetings where the decision may be made to dismiss an employee.
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4. Line Manager Actions

- 4.1 When a new employee has been onboarded with the Trust, the HR team will send a clearance email to relevant staff members (e.g., IT, the school office and their line manager). Within this email the HR team will inform the line manager of the probationary review end date and will attach this process for reference.
- 4.2 When the employee has been with the Trust for 4 weeks, a member of the HR team will contact the line manager to remind them that the first probationary review meeting is due. They will attach the template Probationary Review Form, which should be completed by the line manager digitally during or immediately after the first review meeting.
- 4.3 The line manager will receive an automated email from EveryHR at around 5 weeks, reminding them to book the first probationary meeting with the employee. They will continue to receive reminders until the task has been marked as complete.
- 4.4 The line manager should arrange a probationary review meeting with the employee and use the template Probationary Review Form as a guide to help structure the discussion. The form should be completed digitally by the line manager either during or immediately after the meeting. Any comments that are recorded on the form should have been discussed with the employee as part of the review meeting and should therefore not be a surprise when the employee sees the completed form.
- 4.5 Once the meeting has taken place and the form has been completed, the line manager should email the form to HR@girlslearningtrust.org, copying in the employee to ensure they also receive a copy of the form. The HR team will upload the form to the employee's EveryHR record.
- 4.6 The line manager will then need to mark the task as complete in EveryHR to ensure they do not continue to receive email reminders. To do this they should:
- Login to your EveryHR account.
 - Go to 'My Portal' and select 'My tasks'.
 - Select the relevant probationary task and change the 'status' from 'open' to 'completed'.
 - Select save.
- 4.7 When the employee has been with the Trust for 4 months, the line manager will need to arrange a second probationary review meeting. They will receive a notification from Every reminding them of this task.
- 4.8 The line manager should use the same template Probationary Review Form as they used for the first meeting and go through the same steps (4.4 – 4.6) regarding arranging a meeting, completing the form, sending it to HR and marking the task as complete in Every.

4.9 If the line manager has any concerns regarding the employee's performance, they should raise these with their senior leader and their HR Advisor. This will ensure that the senior leader is fully aware of any issues before they carry out the final review meeting at the 26-week period. Where any concerns have been identified, this may either lead to an extension to the probationary period or termination of the employee's contract of employment.

4.10 Please see the flow diagram in Appendix 1 for a visual summary of the process.

Appendix 1: Probationary Review Process Flow Diagram

