

Therefore, encourage one another and build each other up, just as in fact you are doing”

1 Thessalonians 5:11

Thatcham Park C.E. Primary & Nursery School,

Induction and Probation Model Policy and Procedure and Guidance for Support Staff

Our Christian values underpin our ethos; every child is valued and encouraged to achieve their full potential. Every member of our school community is encouraged to respect and value each other. We want our children to learn to understand and respect our common humanity, diversity and differences so that they can go on to form the effective, fulfilling relationships that are an essential part of life and learning.



1. Purpose

1.1 The purpose of this policy and procedure is to ensure that every new support employee, during the first six months of employment with the school, and every support employee who changes jobs within the school, is given the information, guidance and development opportunities needed to enable him/her to effectively fulfil the requirements of the role.

1.1.1. This policy and procedure has been subject to consultation with trade unions.

1.1.2. West Berkshire Council strongly recommends that Community, Voluntary Controlled, Community Special and Maintained nursery schools adopt this model policy, procedure and guidance. Foundation and Voluntary Aided Schools may also wish to adopt it.

1.1.3. This document is published on the HR intranet pages for schools.

2. Applicability

2.1. This policy and procedure applies to support (non teaching) employees of West Berkshire Schools who take up:

2.1.1. A permanent role, including those who have worked in other local authorities.

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- 2.1.2. A temporary/fixed term role of more than six months in duration, including those who have worked in other local authorities
- 2.1.3. A temporary/fixed term role of less than six months where the headteacher/line manager believes that it may be extended and it is therefore appropriate to follow the probationary procedure.
- 2.2. This procedure does not apply where an employee leaving a West Berkshire School with at least six months service joins another West Berkshire School without a break in service. Voluntary aided and foundation schools may choose whether to recognise continuous service with another WB school for the purpose of this procedure.
- 2.3. This policy and procedure does not apply to temporary agency employees. However, managers should ensure that such employees receive sufficient training to enable them to perform their duties and to safeguard the health and safety of themselves, colleagues, pupils and the public. Managers may wish to use the section on induction and the induction checklist as a starting point when planning appropriate training for agency temps.

3. Policy

- 3.1. The school will ensure that every **new** employee (except agency staff and employees on very short term temporary contracts) has an individual induction programme that includes:
 - Induction into their role and department
 - Induction into the school
- 3.2. The school will ensure that every **new** support employee serves a probationary period of at least 6 months, during which he/she will be supported to achieve the knowledge, skills and competencies required to be effective in the job.
- 3.3. In the event of a **new** support employee failing to reach the required level of performance or conduct during the probationary period, the school will take steps to terminate the employment, having considered alternative solutions where appropriate.
- 3.4. The school will ensure that every support employee **who changes jobs** within the school will have an individual induction programme that includes:
 - Induction into the new role
 - Induction into the new department where this has changed
- 3.5. Where an employee is on a very short fixed term contract the amount of training given should be appropriate to enable the employee to perform their duties and to safeguard the health and safety of themselves, colleagues, pupils and the public. Managers may wish to use the section on induction and the service induction checklist as a starting point when planning appropriate training for employees on very short fixed term contracts.

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4. Roles and Responsibilities

- 4.1. It is the responsibility of each employee to familiarise themselves with and adhere to this policy and procedure.
- 4.2. The Governing Board has a statutory obligation to establish procedures relating to conduct and discipline of staff (School Staffing (England) Regulations 2003) and is responsible for ensuring that all staff are made aware of the induction and probation policy and procedure.
- 4.3. The Governing Board (or headteacher, where responsibility has been delegated to the headteacher) is responsible for making a decision that an employee under the probationary period should cease to work at the school and for instructing West Berkshire Council to dismiss the employee.
- 4.4. All line managers are responsible for:

Induction:

- Creating an individual induction programme for each new employee or existing employee undertaking a new role
- Ensuring employees receive adequate health and safety training
- Ensuring employees have appropriate training and development to enable them to develop the skills and knowledge to do the job
- Ensuring employees receive training in school procedures e.g. data protection, safeguarding.
- Holding regular one to one supervision meetings with the new employee to support and guide him/her in becoming fully effective in the job role
- Ensuring that all employees are familiar with the standards of conduct expected of them.
- Agreeing performance targets with employees as part of the appraisal process, and for new employees, as part of probation.
- Ensuring agency workers and those on very short term temporary contracts receive sufficient training to enable them to perform their duties and to safeguard the health and safety of themselves, colleagues, pupils and the public.

Probation:

- Holding probationary assessment meetings with support employees at specified intervals.
- Assessing and recording progress during probation and taking action to deal with failure to reach the required standards promptly
- Signing off successful completion of probation and confirming employment following the correct procedures.
- Recommending to the Head Teacher that a probationary hearing be convened to consider terminating employment in cases of failure to meet the required standards.
- Ensuring that the employee's appointment is confirmed following a satisfactory final probationary assessment.

- 4.5. Employees are responsible for:

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- Attending and participating in induction, and other training required for the role
- Ensuring that they are familiar and comply with the rules, policies and procedures, standards and requirements of the job; including the code of conduct and disciplinary rules which can be found within the school's Disciplinary Procedure.
- Raising any concerns with the line manager that they have about the standards and requirements of the job
- Undertaking learning and development activities agreed with the manager
- Complying with the expected standards of performance required by their line manager
- Attending and participating in one to one supervision meetings and probationary assessment meetings with their line manager.

4.6. Human Resources (where the school buys the Council's HR service) are responsible for:

- Advising line managers on issues arising during probation.

5. Failure to comply with the school's induction and probation policy and procedure

5.1. Failure to comply with this policy and procedure may result in:

- Employees being unsupported in their new job role
- Employees failing to reach the required standards of performance or conduct within the specified period
- Employees who do not reach the required standards being confirmed in post which will affect the school's ability to deliver its service effectively.

6. Review

6.1. The school will review this policy, procedure and guidance in response to any changes in legislation and at least every 3 years.

The information above is the policy of the school. The sections below contain the procedures to be used to implement the policy, and guidance for managers and support employees.

Procedure

7. Induction

7.1. The induction period provides an important opportunity for new support employees, and those changing jobs within the school, to familiarise themselves with their new environment, their role and their new colleagues.

8. The induction process

8.1. The line manager will provide support employees with an appropriate induction to help new

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employees settle into their new environment and learn their responsibilities and rules relating to their employment.

8.2. The line manager will plan the employee's induction prior to the employee starting in their new role. More senior employees may wish to be involved in planning their induction. Areas to plan include:

- Ensuring the availability of relevant equipment for the role from the start of employment. This may include items such as IT equipment, access cards, logins, personal protective equipment (PPE).
- Arranging who will meet the employee on the first day
- Gathering information required for completing the induction checklist with the employee e.g. the employee's job description, person specification, relevant school policies and procedures including the Code of Conduct and the School's child protection policy.
- Introductions to colleagues and meetings with key employees and other contacts, including the school's designated safeguarding lead.
- Deciding what information the employee requires relating to his/her job, department and the school, including rules, policies, procedures and standards
- Ensuring that the new recruit reads the statutory guidance [Keeping Children Safe in Education - Information for all School and College Staff](#) available from the GOV.UK website, and has the opportunity to discuss its contents and ask questions.
- A discussion about the employee's job description and person specification so that the employee understands the work to be done and standards to be met.
- Establishing training requirements
- Booking in regular one to one supervision meetings to discuss progress and offer support (and probation reviews where the employee is new to the school)
- Briefing all those involved in the employee's induction to ensure they understand what is required

8.3. The line manager and employee will complete a induction using the [induction checklist](#) within the first four weeks of the employee starting in the role.

9. Probation

9.1. The probationary period provides an important opportunity for support employees to familiarise themselves with their job and for line managers to clarify what is required, set standards and encourage development. During the probationary period line managers will make an assessment of performance and conduct to determine whether the employment will be confirmed. A flowchart showing the probationary process can be found in [Appendix A](#).

9.2. The probationary period will normally last for six months. In some specified circumstances it may be necessary to extend probation for a short period (normally no more than three months). See section 13 below.

9.3. If there are serious concerns about performance and/or conduct at any point during the probationary period, and the manager considers that insufficient improvement is likely to be made, employment may be terminated before the end of the probationary period. See 12.2 below.

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9.4. Before an employee's employment is terminated he/she will be able to present his/her case at a probationary hearing (section 15), at which he/she may be accompanied by a trade union representative or work colleague. There is a right of appeal against a decision to terminate employment.

9.5. No formal action will be taken against a trade union representative until, having consulted with the employee concerned, the circumstances of the case have been notified to a regional officer of the trade union concerned.

9.6. The timescales in this procedure may be changed in exceptional circumstances.

10. Probationary assessment

10.1. Employees will be given feedback about their performance and conduct at regular one to one supervision meetings and at probationary assessment meetings.

10.2. Probationary assessment meetings will normally take place after one month, at three months and during the fifth month of employment.

10.3. Minor concerns about an employee's performance and/or conduct will normally be discussed at supervision meetings and at the first and second probationary assessment meetings. Targets for performance will be set, standards explained and reasonable additional support and/or training will be given as appropriate to assist the employee in achieving a satisfactory level of performance and conduct. Progress against targets will be reviewed regularly and at the final probationary assessment meeting.

10.4. If a pay increment is due whilst the employee is still on probation (for example; because probation has been extended) and performance or conduct is not satisfactory the increment will be withheld until the employee has successfully passed his/her probationary review and employment is confirmed. The increment will be paid from the date that the employee passes his/her probationary review and will not be back dated.'

11. Successful completion of probation

11.1. If the employee's performance and conduct have been satisfactory his/her appointment will be confirmed in writing by the school at the end of his/her probationary period.

12. Failure to reach the required standard

12.1. If the line manager considers that the employee's conduct and/or performance does not reach the required standards by the end of the probationary period and is unlikely to reach them during an extension of probation, he/she should recommend to the head teacher that a probationary hearing be arranged to consider termination of employment (dismissal).

12.2. If there are serious concerns about an employee's performance and/or conduct at any point during his/her probationary period, and the employee's line manager considers that sufficient improvement is unlikely to be made, a probationary

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hearing may be held earlier in the employee's probationary period and the employment may be terminated before the end of the probationary period.

13. Extension of probationary procedure

- 13.1. A decision to extend the probationary procedure may be made in the following circumstances. The decision should normally be made no later than the final probationary review meeting (normally held during the fifth month of employment);
 - 13.1.1. Where the employee's conduct and/or performance does not reach the standards required by the end of the probationary period but the line manager decides that there is a good chance of the required improvement being achieved, the probationary period may be extended normally for a maximum of three school months.
 - 13.1.2. Where it has not been possible to make a fair assessment of the employee's performance and/or conduct within the probationary period for good reason, the line manager may decide to extend the probationary period normally for a maximum of three school months.
 - 13.1.3. Where an employee has not met the required standards of performance and this may be due to a disability, he/she will be referred to the school's Occupational Health advisor. If necessary the probationary period will be extended whilst advice from Occupational Health is sought and appropriate action as described below is carried out:
- 13.2. Where the employee's disability is affecting performance, the manager will meet him/her and consider whether there are any reasonable adjustments that can be made to assist him/her in achieving the required standards within his/her role. Advice from Occupational Health will be taken into account.
- 13.3. Where it is not possible to make reasonable adjustments to enable the employee to reach an acceptable standard of performance, redeployment to suitable alternative employment will be considered. Redeployment will normally be sought for a period of four school weeks.

14. Misconduct and incapability during the probationary period

- 14.1. Minor misconduct and/or lack of capability will be dealt with as part of day to day management, supervision meetings and probationary reviews.
- 14.2. The disciplinary rules relating to misconduct are set out in the School's Disciplinary Procedure and Code of Conduct.
- 14.3. Any allegation of serious or gross misconduct or of serious incapability should be investigated; it should not be left until the end of the probationary period until it is dealt with. If the manager considers that the employee is unlikely to meet the required probationary standards as a result of the alleged misconduct, or because of persistent minor misconduct, a probationary hearing should be arranged as set out in section 15 below.

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15. The Probationary Hearing

- 15.1. The probationary hearing is convened to decide whether to terminate employment where the employee has not met the required standards for performance and/or conduct during the probationary period or extension of the probationary period.
- 15.2. The probationary hearing will be convened to consider the dismissal of an employee who has failed to meet the required standards of performance and/or conduct during his/her probationary period. It may be arranged:
 - 15.2.1. At the end of the probationary period following the final assessment meeting, but before the end of the probationary period
 - 15.2.2. At the end of an extension of probation, or
 - 15.2.3. Before the end of probation where serious concerns are raised about performance and/or conduct
- 15.3. The probationary hearing will follow the procedure set out in the section on the dismissal hearing, and follow the the authority to act, that are specified in the school's disciplinary procedure.
- 15.4. The outcome of the hearing may be either an extension of probation or dismissal.
- 15.5. There will be a right of appeal as set out in appeals section of the school's disciplinary procedure. The appeal hearing may confirm or overturn the decision of the probationary hearing. It may result in the probationary period being extended.
- 15.6. The school has a legal duty to refer to the Disclosure and Barring Service anyone who has harmed, or poses a risk of harm, to a child, or if there is reason to believe that the member of staff has committed one of a number of listed offences, and who has been removed from working (paid or unpaid) in regulated activity, or would have been had they not left. The DBS will consider whether to bar the person from working with children. The referral should be made as soon as possible after the resignation or removal of the individual.

Guidance for line managers

16. Induction

- 16.1. The line manager should plan and carry out a thorough induction as outlined in section eight of the procedure.

17. One to one supervision meetings for all support employees undertaking a new role

- 17.1. Regular supervision meetings provide an important opportunity to:

- Develop sound two-way communication

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- Explain standards of performance and conduct required
- Encourage development and identify support required
- Ask the employee if he/she needs any further information, support and/or training
- Provide feedback on performance and conduct
- Clarify any areas that the employee is unsure of
- Handle any minor conduct or capability issues.

17.2. Careful consideration should be given to how often to hold supervision meetings with employees during the initial stages of the new role. Early on meeting once per week may be appropriate to provide adequate support and an opportunity for the employee to ask questions and ask for additional support if required. Meetings can be reduced in frequency to once a fortnight, then once per month as the employee grows in confidence and effectiveness within their role.

18. Assessing Performance

18.1. Line managers need to assess the performance of all support employees new to post and to provide feedback. The way in which this is done will vary depending upon the employee's job, responsibilities, and work environment. Managers should discuss how performance and conduct will be assessed with the employee. Areas to consider include:

- Quality of work
- Quantity of work
- Flexibility
- Customer care
- Attendance and time keeping
- Reliability
- Relationship with other employees
- Initiative
- Conduct

18.2. When assessing performance and identifying suitable training and support managers should take care not to discriminate on grounds of:

- Age
- Disability
- Sex
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion and belief
- Sexual orientation

18.3. Different employees may approach the same job in different ways. Managers should concentrate on objectively assessing performance against the required standards and providing appropriate support and training to enable employees

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to meet these. Further advice can be sought from the school's HR advisor.

- 18.4. Minor misconduct or capability issues should be handled through day to day management and supervision meetings. Where the employee is on probation, these matters should also be discussed at probationary meetings. Standards required and the way in which the employee has not achieved should be explained. The employee should be given the opportunity to explain the reasons for the under performance and/or misconduct, and whether there is any further support and/or training that would enable him/her to achieve an acceptable standard of support and/or training. The line manager should set targets, put any agreed support and/or training in place and explain how and when progress will be reviewed.
- 18.5. If an employee's performance and/or conduct gives serious cause for concern at any time it should be handled under the appropriate procedure. For employees within their probationary procedure use the induction and probation procedure (see section 14 above), for other employees the use school's procedures for disciplinary, performance capability or managing sickness absence should be used as appropriate.

19. First and second probationary assessment meetings for those within a probationary period

- 19.1. Managers will formally assess the employee's performance and conduct at the probationary assessment meetings held after the first, and during the third and fifth month of employment.
- 19.2. The manager should complete a [probationary assessment form](#) after each meeting, and keep a copy securely on the employee's personnel file.
- 19.3. The probationary assessment meetings enable the manager to feedback more formally on performance and conduct, to listen to the employee's views on what he/she feels will assist him/her with his/her performance, and to identify any further reasonable support, training or development that the employee may need.
- 19.4. The manager and employee should review the progress the employee has made in achieving and maintaining the desired standards, review any support/training agreed to support him/her and agree further support and review dates.
- 19.5. It is important that the manager addresses any concerns about the employee's performance or conduct at the probationary assessment meetings. These should already been raised and an attempt made to resolve them during one to one supervision meetings. Standards required should be clarified, targets set, where necessary further support and training should be agreed, and review dates set.
- 19.6. The manager should keep a note of the key points, targets and agreed actions and give the employee a copy of these after the meeting.

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20. Final probationary assessment

- 20.1. The manager should hold the final probationary assessment meeting during the fifth month of employment, taking into account the expected progress during the final few weeks to the end of the sixth month of employment.
- 20.2. Where the employee has met all the standards required of him/her, the manager should complete the final assessment form and pass it to the headteacher for signature. The form should then be kept securely on the employee's personnel file. The school should write to the employee to confirm his/her employment.

21. Extension of probation

- 21.1. The circumstances in which probation may be extended are set out in section 13 of the procedure. When considering whether to extend the line manager should seek advice from the head teacher and school's HR advisor.
- 21.2. The total length of the employee's probation will not normally exceed 12 months
- 21.3. Any decision to extend should be recorded in writing, including the reasons for the decision and the length of the extension. A copy should be given to the employee and a copy placed securely on the employee's personnel file. The final probationary assessment should be reconvened at the end of the specified period.
- 21.4. An extension may be considered where the shortfall in standards is minor and the manager believes that with a structured programme of support and guidance the employee could meet the standards required within three months or less. Or there may have been circumstances outside the control of the employee which mean that a fair assessment has not been possible; for example where the manager or the employee has been absent for a large proportion of the probationary period.
- 21.5. Particular care should be taken where failure to meet the required standards may be due to a disability. Advice should be sought from the school's Occupational Health advisor. Where this advice confirms that the employee has a disability that affects his/her performance, the manager should meet with the employee to consider whether there are any reasonable adjustments that can be made to assist the employee in achieving the required standard. Further advice should be sought from the school's HR advisor. Adjustments may include:
 - Making adjustments to premises
 - Allocating some of the disabled person's duties to another person
 - Altering the person's working hours
 - Allowing the person to be absent during working hours for rehabilitation, assessment or treatment
 - Providing training
 - Acquiring or modifying equipment
 - Modifying instructions or reference manuals

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- Modifying procedures for testing or assessment
- Providing a reader or interpreter
- Adjusting trigger points for action under the school's procedures for managing sickness absence
- Providing additional supervision
- Transferring the person to fill an existing vacancy (redeployment)

21.6. It may also be appropriate to seek advice from 'Access to Work' to see whether there may be any external support or funding available to assist a disabled employee with their needs

21.7. The manager should extend the probationary procedure for an employee with a disability if this is necessary to properly explore options for making reasonable adjustments, including a period of four school weeks to seek redeployment where this is considered appropriate.

22. Arrangements for a probationary hearing

22.1. The procedure for notifying an employee of a probationary hearing will be the same as those notifying employee's of hearings under the school's disciplinary procedure.

22.2. The authority to chair the probationary hearing and take a decision to terminate employment will also be as set out in the school's disciplinary procedure.

23. Employee representatives

23.1. The employee has the right to be accompanied at probationary hearings, appeal hearings and investigation meetings by a trade union representative or work colleague. In exceptional circumstances the employee may be allowed to be accompanied by an alternative representative, for example where the employee needs particular language support or other special needs.

23.2. The representative may confer with the employee during the hearing/investigation meeting, explain his/her case, ask questions, sum up and respond to views expressed at the hearing/ investigation meeting so long as the employee is happy for the representative to do so. The representative has no right to answer questions on the employee's behalf, except in exceptional circumstances, where the Chair permits him/her to do so.

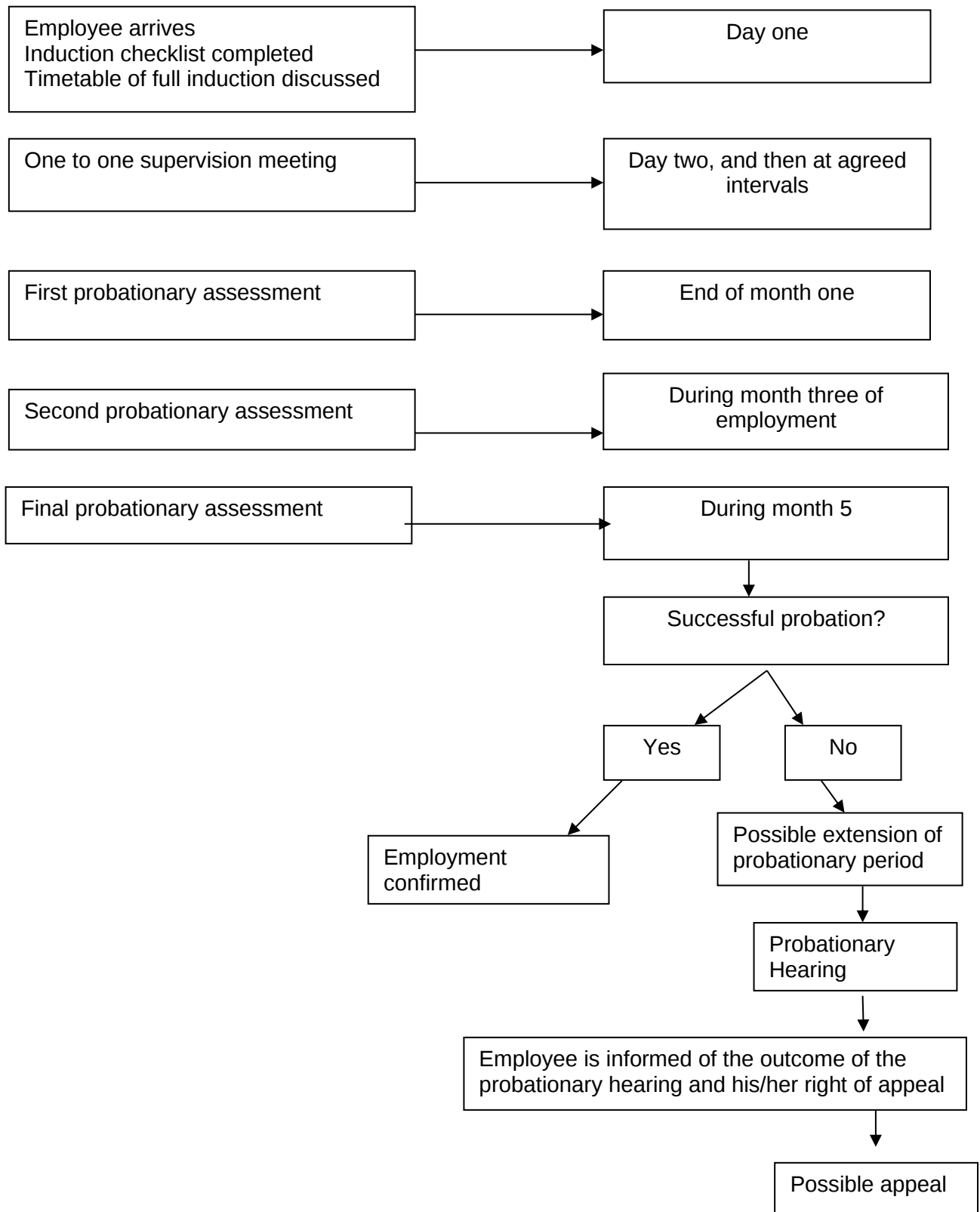
24. Referral to external bodies in cases of misconduct and/or incompetence:

24.1. In certain circumstances the Council is obliged to report cases to certain external bodies such as the DBS (see point 15.7) where an employee has been dismissed or removed from working with children or vulnerable adults (or would have if the person had not left or resigned).

24.2. Managers should seek further advice from the school's HR advisor where they are taking action under the probationary procedure that may require such a referral.

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Appendix A Probationary Process Flowchart



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Other Relevant Documentation

Model induction checklist for school support staff

Model probationary assessment form for school support staff

Disciplinary Procedure

Code of Conduct

Capability Procedure

Ill health Capability Procedure

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