

Probationary Period Policy

The Bristol Methodist District. (Charity Number 1134873)

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1 Introduction

- 1.1 We operate probationary periods for all new employees.
- 1.2 We recognise that starting a new job can be challenging and are committed to ensuring that you are fully supported during your probationary period.
- 1.3 The aim of the probationary period is to allow both you and the organisation to assess objectively whether you are suitable for the role.
- 1.4 This policy does not form part of your contract of employment, and we reserve the right to amend or withdraw it at any time.

2 Scope

- 2.1 This policy applies to employees employed by us. It does not apply to workers, contractors, consultants or any self-employed individuals working for the organisation.

3 Your probationary period

- 3.1 Your contract of employment will specify whether your employment is subject to a probationary period, its length and any conditions attached to it.

4 Probation plan

- 4.1 At the start of your employment, your Line Manager will outline a probation plan which will set out one or more of the below:
 - 4.1.1 the training and/or support that will be provided to you;
 - 4.1.2 the objectives that you will be expected to meet; and
 - 4.1.3 our expectations in terms of your conduct.
- 4.2 Your individual plan will depend on your job role, level of responsibility, previous work experience and your training needs.
- 4.3 As your probationary period will coincide with the onboarding process, some of the tasks that you cover during your onboarding may be used to review your performance, capability and suitability for the role as part of your probationary period.

5 Review meetings

- 5.1 Throughout your probationary period, your Line Manager will monitor your performance and progress and provide feedback to you during frequent review meetings.
- 5.2 In addition to these review meetings, your Line Manager will check in with you regularly to ensure that you understand what you need to do, provide you with feedback and check that you have sufficient support.

6 Final review meeting

- 6.1 Shortly before the end of your probationary period, your Line Manager will meet with you to conduct a final review of your performance, progress and suitability for the role.

- 6.2 If your Line Manager feels that satisfactory progress has not been made during your probation, you will be informed in writing prior to the final review meeting.
- 6.3 The letter will set out sufficient information and examples of why your Line Manager believes your performance has fallen short of an acceptable standard and explain the possible outcomes of the meeting (see below). *In these circumstances, you may, if you wish, ask a work colleague or trade union official to attend the meeting with you.*
- 6.4 At the final review meeting, you will be given an opportunity to ask questions and comment on your probationary period. The outcome of the meeting may be a decision to:
- 6.4.1 confirm your permanent appointment where your Line Manager is satisfied with performance or
 - 6.4.2 extend your probationary period or
 - 6.4.3 terminate your employment or
 - 6.4.4 invite you to a performance dismissal hearing if your Line Manager considers further support or training is unlikely to lead to a satisfactory standard of performance.
- 6.5 The outcome will be confirmed to you in writing, following the final review meeting, explaining the grounds on which the decision was reached.

7 Extending your probationary period

- 7.1 The decision to extend your probationary period will be entirely at our discretion.
- 7.2 This may be in circumstances where your performance has not been entirely satisfactory, but we consider that an extension may lead to an improvement, or where you or your Line Manager has been absent from the workplace for an extended period during the probationary period.
- 7.3 If an extension to your probationary period is agreed, we will write to you setting out:
- 7.3.1 the length of the extension and the date on which the extended period of probation will end;
 - 7.3.2 the reason for the extension and, if the reason is poor performance, details of how and why your performance has fallen short of your objectives;
 - 7.3.3 the objectives that you are required to achieve by the end of the extended period of probation;
 - 7.3.4 any support, for example further training, that will be provided to you during the extended period of probation.
- 7.4 Any extension should be agreed and arranged before your original probationary period ends.

8 Final review of extension meeting

- 8.1 Shortly before the end of any agreed period of extension, your Line Manager will meet with you to conduct a final review of your performance during the extension period.
- 8.2 If your Line Manager feels that satisfactory progress has not been made during the extended period of your probation, you will be informed in writing prior to the final review of extension meeting. The letter will set out information and examples of why your Line Manager believes your performance has fallen short of an acceptable standard and explain the possible outcomes of the meeting. *In these circumstances, you may, if you wish, ask a work colleague or trade union official to attend the meeting with you.*
- 8.3 At the meeting, you will be given an opportunity to ask questions and comment on your probationary period.
- 8.4 The outcome of the meeting may be a decision to:

- 8.4.1 confirm your permanent appointment where your Line Manager is satisfied with performance;
- 8.4.2 terminate your employment if your Line Manager considers that further support or training is unlikely to lead to a satisfactory standard of performance.

8.5 You should be aware, that we will not extend a period of probation more than once unless there are exceptional circumstances.

8.6 The outcome will be confirmed to you in writing, following the final review of extension meeting, explaining the grounds on which the decision was reached.

9 Responsibility during probationary period

9.1 Your Line Manager will take the lead role in monitoring your performance and progress during the probationary period.

10 Data protection

10.1 We process any personal data collected during the probationary period in accordance with our Data Protection Policy. In particular, we will record only the personal information required and keep the information only for as long as necessary.

11 Review

11.1 This policy may be reviewed at any time at the request of any member of staff, but it will be automatically reviewed two years after initial approval and thereafter on a biennial basis unless organisational changes, legislations, guidance, or non-compliance prompt an earlier review.

12 Definitions

12.1 The Bristol Methodist District ("we", "us", "our")

12.2 The Employee ("you", "your")

Document control box

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