CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

Probation Period Guidance – NJC Staff

Human Resources

September 2026

1. Introduction

1.1 The purpose of this guidance is to set a clear process for headteachers/ managers to manage the performance and conduct of employees during their probationary period.

1.2 The school operates probationary periods for all new employees on NJC terms and conditions. The probation period is set out in the contract of employment.

1.3 Probation is a formal arrangement at the start of an appointment, whereby new members of staff demonstrate their suitability for a particular job within a set timescale. During this time, employees should be given an induction programme, guidance and training and their performance monitored and reviewed.

1.4 Probationary periods will be used constructively to help new employees integrate effectively into the school and allow their headteacher/manager to assess objectively whether the employee is suitable for the role. The school believes that the use of probationary periods increases the likelihood that new employees will perform effectively in their employment.

1.5 The headteacher/manager is responsible for setting objective performance standards for the employee and should discuss their expectations with the employee during their induction, ensuring that all new employees are properly monitored during their probationary period. If any problems arise, they should be addressed promptly. This will ensure that the employee is aware that some aspect of their performance or conduct is unsatisfactory and prevent the problem from escalating.

2. Length of probation

2.1 The standard period of probation is 3 months.

3. Reviews during probation

3.1 The headteacher/manager should review and assess the employee's performance, capability, and suitability for the role on at least a monthly basis during the employee's probation. The following probationary period schedule is recommended as a guide:

- induction: set targets
- end of month 1: informal review
- end of month 2: informal review
- end of month 3: formal review – decision required whether probation period is completed, or an extension is required
- end of month 4: informal review – decision required by the headteacher/ manager whether probation period is completed or if the matter should be referred to the governing body's dismissals committee for consideration.

- end of month 5: Governing body's dismissals committee to meet to decide whether probation period has been completed successfully or whether the employee is to be dismissed.
- A model letter inviting an employee to a probation review meeting is included in Appendix B. A clear record should be made of each review meeting. A copy of the record and any action plans should be shared with the employee.

3.2 During an employee's probation, the headteacher/manager should provide regular feedback to the employee about their performance and progress, and should there be any problem areas, raise these with the employee as soon as possible with a view to resolving them. The headteacher/manager is also responsible for providing guidance and support and for identifying and arranging any necessary training or coaching.

3.3 The level of support required will differ depending on the individual employee. All support necessary should be given by the headteacher/manager to allow the employee to successfully complete their probationary period and continue their employment.

3.4 The headteacher/manager should ensure the employee receives appropriate training at the start of the probationary period. An induction and training plan should be set in place to assist with the employee's development and introduction to the school. All relevant school documentation should be made available to the employee at the earliest date.

3.5 The headteacher/manager should ensure that the employee completes any mandatory training prior to the completion of their probationary period, as appropriate. This will include completing the relevant mandatory e-learning modules.

4. Providing support for disabled employees

4.1 As legally required by the Equality Act 2010, line managers must provide additional support to disabled employees to ensure they are not subjected to unlawful or less favourable treatment during their probationary period. Reasonable adjustments must be made to remove any barriers the employee faces at work.

4.2 Reasonable adjustments should be discussed and documented as part of the induction.

4.3 The headteacher/manager should discuss the support offered to disabled employees during their probationary period with Human Resources (HR).

5. Extending probationary periods

5.1 The headteacher/manager reserves the right to extend an employee's period of probation at their discretion. This will be limited to one extension, and the total period of probation will be no longer than 5 months.

5.2 An extension may be implemented in circumstances where the employee's performance during probation has not been entirely satisfactory, but it is thought likely that an extension to the probationary period may lead to an improvement, or where the employee or headteacher/manager has been absent from the workplace for an extended period during probation.

5.3 Before extending an employee's probationary period, the headteacher/manager should consult with HR and arrange a meeting with the employee to discuss:

- the length of the extension and the date on which the extended period of probation will end
- the reason for the extension and, if the reason is unsatisfactory performance, details of how and why performance has fallen short of the required standards
- the performance standards or objectives that the employee is required to achieve by the end of the extended period of probation
- any support, for example further training, that will be provided during the extended period of probation
- if the employee does not meet fully the required standards by the end of the extended period of probation, their employment may be terminated

5.4 Failing to fulfil performance standards or objectives in a timely manner could lead to the employee failing to complete their probationary period. A record of any agreed actions should be made in writing and provided to the employee.

5.5 If an extension to the probationary period is agreed, the headteacher/manager will confirm the terms of the extension in writing to the employee, including the information outlined above which will have been discussed during the meeting.

5.6 The headteacher/manager should complete the Probationary Period Form (Appendix A) following this decision. Any proposed extension must be agreed and confirmed prior to the end of the current probationary period.

5.7 During the probationary period, employees will be subject to all the terms and conditions of their contracts of employment.

6. Irregularities discovered during the probationary period

6.1 If, during an employee's probation, it is suspected or established that the employee does not have the qualifications, experience, or knowledge that they claimed to have at the time of recruitment, the matter will be discussed with the employee to establish the facts. If the evidence suggests that the employee misrepresented their abilities in any way, the matter will be treated as misconduct and dealt with

in accordance with the School Disciplinary Policy, which may result in terminating the contract of employment.

7. End of probation

7.1 Before the end of the probationary period, the headteacher/manager should conduct a final review of the employee's performance and suitability for the job. This will involve a meeting with the employee to discuss their performance and progress throughout the period of probation. The review should be conducted shortly before the date on which the employee's probationary period comes to an end.

If the employee's performance is satisfactory, the headteacher/manager should complete the Probationary Period Form (Appendix A).

7.2 If the employee's performance has not met the standards required, arrangements must be made for the governing body's dismissals committee to meet to decide whether the employee should be dismissed. The mA final decision must be before the end of the 5th month to ensure sufficient notice is provided to the employee.

8. Termination of employment

8.1 If an employee's performance while on probation has been unsatisfactory, despite support from the headteacher/manager, and it is thought unlikely that further training or support would lead to a satisfactory level of improvement, the matter will be referred to the Governing Body's dismissals committee to determine whether the employment should be terminated at the end of the probation period.

8.2 The employee should be allowed to complete the designated period of probation rather than terminating employment before the probation has come to an end. This is to give the employee a full opportunity to come up to the required standards. If, however, there is clear evidence prior to the end of the period of probation that suggests the employee is wholly unsuitable for the role, the headteacher/manager should consult their HR officer with a view to referring the matter to the dismissals committee to terminate the employee's contract early.

8.3 Where a decision is taken to terminate the employee's contract of employment, the employee must be interviewed and informed of the reason for the termination. The reasons for termination should be recorded in the probationary period review form.

8.4 As the termination occurs during a probation period, the employee will not have the right to appeal the decision.

9. Staff benefits

9.1 During their probationary period, new employees may not be eligible for certain staff benefits until such time as they have successfully completed their probationary period.

9.2 This will include salary sacrifice schemes, such as car loans and cycle to work. Upon completion of their probationary period, staff's eligibility will depend on the relevant terms and conditions of the scheme.

9.3 Applications to undertake a qualification will also be ineligible during probationary periods, unless it is a critical requirement of the post. In any such instances, all course costs will be paid for by the relevant service.

9.4 In circumstances where probationary periods have been extended up to the maximum 5 months, the restrictions will remain in force until the probationary period has been completed satisfactorily.

Appendix A

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Probationary Period Form

Name:

Start date:

Pay number:

Job title:

School:

Review of performance:

Objectives/targets	Improvement required	Average	Good	Excellent
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

Summary of employee's overall performance:

Has the above named new recruit successfully completed their probationary period?

☐ yes ☐ no

If no, do you wish for their probation to be extended?

☐ yes ☐ no

If yes, your reasons for your decision:

Note areas of work requiring further improvement/training:

Agreed objectives

1.
2.
3.
4.
5.

Any further comments:

Signature (headteacher/manager):

Signature (staff member):

Date:

Appendix B

Model letter inviting employee on probation to review meeting

Dear [ ]

Meeting to discuss progress during your probationary period

As you have now been with the school for nearly [one month/2 months], I would like to invite you to an informal review meeting to discuss your performance and progress to date. The meeting will be held on [date] at [time].

Please could you also let me know in advance of the meeting if there's any specific issues that you would like to discuss at the meeting, for example if you have encountered any problem areas in your role or if you are unclear about anything.

After the meeting, I will make a brief record of what we have discussed, and a copy of will be provided to you.

Please do not hesitate to contact me if you have any queries or concerns.

Yours sincerely