



THE MERCIAN TRUST

# Associate Staff Probationary Policy



*Effective from:*

December 2025

*Approved by:*

## People & Culture Committee

### *Responsibility:*

# Director of People and Organisational Development



### Policy changes since the last review

- New Policy December 2025

### *Review process:*

This policy will be reviewed according to The Mercian Trust's Policy Schedule outlined in its Scheme of Delegation. If there are any changes in legislation or legal requirements, an earlier review will be conducted to ensure compliance and relevance.

## 1 INTRODUCTION

- 1.1 The Mercian Trust is committed to helping every new Associate staff member succeed in their role. To support this, we provide a 6-month probationary period designed as a positive and collaborative process.
- 1.2 This period allows both the new staff member and the Trust to ensure the role is a good fit and to identify any support or development needs early on.
- 1.3 This policy applies to all new Associate staff to the Trust and applies until such time that it has been confirmed in writing to you that you have successfully completed your probationary period.
- 1.4 This policy does not apply to existing Trust staff moving to a new a role or to a role in a different school or central team, as they are not subject to probationary periods.
- 1.5 We may update or adapt this policy to reflect improvements in our approach.

## 2 PURPOSE OF THE PROBATIONARY POLICY

- 2.1 To give new staff time to settle into their role and understand expectations.
- 2.2 To provide regular feedback and guidance to help staff succeed.
- 2.3 To identify any training or support needs promptly.

## 3 HOW THE PROBATIONARY PERIOD WORKS

- 3.1 All new Associate staff will have a standard 6-month probationary period.
- 3.2 During this time, you will be supported by your line manager and team.
- 3.3 Our aim is to work with you to address any challenges and help you thrive.
- 3.4 If concerns arise, we will discuss them openly and agree on clear steps for improvement.
- 3.5 Either party can choose to end employment at any time within the probationary period and do not have to wait until the end of probationary period review meeting takes place. The notice periods that apply during a probationary period are set out in the contract of employment but are usually one week.

## 4 PROBATIONARY REVIEWS

- 4.1 At least every 4 weeks, your manager will meet with you to discuss progress, answer questions, and provide feedback. These conversations are informal and focused on support. If any concerns arise, they will be documented with clear improvement plans.
- 4.2 After **3 months a formal review** should be undertaken by your manager. **Appendix 1 provides a mid-probation review template** which should be used. You will receive a copy of your mid-probation review record from your managers and a record will be stored on your HR personnel file. The mid-point review is an opportunity to celebrate successes, review objectives, and agree on any additional support needed.
- 4.3 If everything is satisfactory, your monthly check-ins will continue. If challenges continue to be identified, your manager will work with you and HR to provide further guidance and support as required

to help you reach any improvements identified. Support could include attending specific training sessions, suggestions for further reading, helpful on-line resources, shadowing other staff members, being assigned a mentor, increasing the frequency of check-ins with your manager.

## 5 END OF PROBATIONARY PERIOD REVIEW

- 5.1 At the end of the probationary period, an end of probationary review meeting will be held using the template form in **Appendix 2**.
- 5.2 If successful, your employment will be confirmed, in writing, as permanent and any applicable pay progression, as outlined in your contract of employment, will be processed. Your managers will complete a Payroll Changes Form, to notify payroll of this. The pay increase will take effect from the 1<sup>st</sup> of the following calendar month.
- 5.3 If more time is needed, your manager may extend your probationary period once (up to 3 months) with a clear plan for success. In circumstances where the probationary period is extended, you will have a second end of probationary period review meeting at the end of the extended period. Probationary periods can only be extended once and up to a maximum period of 3 months.

## 6 IF PROBATION IS UNSUCCESSFUL

- 6.1 Whilst our aim is always to help staff succeed, there may be occasions where, despite support and feedback, the probationary period does not result in a satisfactory outcome. In these cases:
  - **Early Discussions:** Concerns will be raised promptly with you during check-ins or reviews, with clear improvement plans and timescales.
  - **HR Involvement:** Before any decision is made or any end of probation meetings take place, the manager undertaking the probationary review meeting will consult with HR and the Headteacher/Senior School or Central MAT Leader to ensure fairness and compliance.
- 6.2 **Final Review:** At the end-of-probation meeting, if performance or conduct remains below expectations, the manager will explain the reasons and confirm the decision in writing.
- 6.3 **Notice Period:** Employment may be ended in line with the notice period stated in your contract of employment, which is usually one week. You will be informed whether you are required to work your notice or whether you will be paid in lieu of your notice and what your final date of employment will be. Any outstanding holiday entitlement will also be paid in your final pay.
- 6.4 **Next Steps:** HR will provide guidance on final pay, benefits, and any other exit arrangements.

## 3-Month Mid-Probation Review Form

Staff Members Name	
Job Role	
School/Central Team	
Line Manager	
Date of Review	

	Improvement Required	Meets expectations	Exceeds expectations	Comments
Attendance and Punctuality				
Pace of work				
Quality of work				
Conduct and attitude				
Teamwork and communication				

Progress against any objectives set
What's going well
What needs further work
What training/support is required

Is the staff member on track to successfully complete probation?

- Yes
- No
- Further review required

## End of Probation Review Form

Staff Members Name	
Job Role	
School/Central Team	
Line Manager	
Date of Review	

	Improvement Required	Meets expectations	Exceeds expectations	Comments
Attendance and Punctuality				
Pace of work				
Quality of work				
Conduct and attitude				
Teamwork and communication				

Progress against any objectives set
Any identified areas of concern
Is further training/support required

Has the staff member successfully completed their probation period

- Yes, don't forget to do a payroll changes form if the staff member is to receive an increment
- No, if no please supply further details below
- Further review required (maximum 3 months), please give further details below

Reason for not completing probation successfully
Reason for extending probation (including the improvements required)
How long is the probation period being extended for?
What support is being put in place?
Provide dates when progress will be reviewed?