



Probation Policy

Introduction

It is the policy of The Cardiff Circuit (the employer) to operate probationary periods for all new employees, and in some cases, at the employer's discretion, in respect of employees who have been transferred or promoted into different posts.

The purpose of the probationary period is to offer support and guidance to all new employees in order that there is a clear understanding of the requirements of the role along with offering the necessary support to achieve the required standard during the initial period of employment.

At the same time, it provides The Cardiff Circuit with an opportunity to assess the performance and future potential of the employee before confirming the appointment.

Under this policy the Line Manager is responsible for ensuring that all new employees are properly supported and their performance is monitored during their probationary period. If any problems arise the Line Manager should address these 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.

Length of probation

The employer's standard period of probation is three/six months. For senior management, professional positions and roles with complex responsibilities, the employer may impose a longer probationary period of e.g. six months. The period of probation will be set out in the Written Statement of the Terms & Conditions of each new employee.

Extending probationary period

The employer reserves the right to extend an employee's period of probation at its discretion. This will be limited to one extension and the total period of probation will be no longer than 12 months.

An extension may be agreed 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 the Line Manager has been absent from the workplace for an extended period during probation.

Before extending an employee's probationary period, the Line Manager must consult with the District Lay Employment Secretary (DLES)/Chair of the Circuit Leadership Team. If an extension to the probationary period is agreed, the employer will confirm the terms of the extension in writing to the employee, including:



Cardiff Methodist Circuit

The Methodist Church in Cardiff & Caerphilly



- 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; and
- a statement that, if the employee does not meet fully the required standards by the end of the extended period of probation, their employment will be terminated.

Line Manager's responsibilities

Under this policy, the Line Manager has responsibility for monitoring a new employee's performance and progress during the probationary period. The Line Manager must ensure that the employee is properly informed at the start of their employment about what is expected of them during probation, for example the required job outputs or standards of performance.

Mandatory training

To successfully complete their probationary period, all new employees and workers are required to complete the following mandatory training:

- Local safety induction training
- Equality, Diversity and Inclusion
- Data Protection
- Safeguarding (for those working with children or adults at risk)
- other as required

Interim reviews during probation

The Line Manager should arrange interim reviews and assess the employee's performance, capability and suitability for the role on at least a monthly basis during the employee's probation, and again at the end of the probationary period.

A clear record should be made of each review meeting. A copy of the record should be passed to the employee and the original kept in the employee's personnel file.

The employer processes any personal data collected during the probationary period in accordance with the Methodist Church's Data Protection Policy. The privacy notice is available from the TMCP website: [Managing Trustees' Privacy Notice - Trustees for Methodist Church Purposes \(tmcp.org.uk\)](https://www.tmcp.org.uk). Any data collected is held securely and accessed by, and disclosed to, individuals only for the purposes of operating the probationary period. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the employer's data protection policy immediately.



Cardiff Methodist Circuit

The Methodist Church in Cardiff & Caerphilly



During an employee's probationary period, the Line 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 Line Manager is also responsible for providing guidance and support and for identifying and arranging any necessary training or coaching.

In assessing performance, consideration should be given to any contextual factors which may have affected the employee's ability to perform to their full potential (for instance, caring responsibilities, periods of maternity/paternity/adoption leave, bereavement, ill health or injury, medical treatments or a disability).

Where an employee has indicated that they have a disability as defined the Equality Act 2010, the Line Manager should take care to ensure that reasonable adjustments are made to the workplace and/or working arrangements so that the employee is not at a substantial disadvantage when compared to a non-disabled person.

Irregularities discovered during the probationary period

If, during an employee's probationary period, 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 employer will terminate the employment, giving one week's pay in lieu of notice.

End of probation - final probation review

At the end of the probationary period, the Line 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 must be conducted on or shortly before the date on which the employee's probationary period comes to an end.

If the employee's performance is satisfactory, the Line Manager should notify the DLES/Chair of the Circuit Leadership Team and issue a letter of confirmation of appointment to the employee.

If the employee's performance has not met the standards required by the employer, the Line Manager should discuss the matter with the DLES/Chair of the Circuit Leadership Team before any decision is made to terminate the employee's employment.

Where the probationary period has not been completed satisfactorily but where a further period of probation is judged to provide realistic opportunity for a satisfactory outcome, the Line Manager should, in agreement with the DLES/Chair of the Circuit Leadership Team, seek to extend the probationary period for a further period.



Cardiff Methodist Circuit

The Methodist Church in Cardiff & Caerphilly



Any extension to the probationary period must be with good cause (see the section above re. extending probationary periods), and the Line Manager must be able to demonstrate the benefits of such an extension.

The Line Manager must inform the employee of the decision and provide them with an action plan for completion during the extended period.

The Line Manager should complete the Probation Review Form recommending that the probationary period should be extended, indicating the period of the extension and including a copy of the action plan. Copies of these should be given to the employee.

Termination of employment

If an employee's performance while on probation has been unsatisfactory (despite reasonable support and training), and it is thought unlikely that further training or support would lead to a satisfactory level of improvement, the employment will be terminated at the end of the period of probation.

It is the policy of The Cardiff Circuit to allow the employee 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 Line Manager should consult the DLES/Chair of the Circuit Leadership Team with a view to terminating the employee's contract early.

Where a decision is taken to terminate the employee's employment, the employee must be invited to a meeting and informed of the reason for the termination. The employer will write to the employee confirming the termination and the reason for it. The employee will be given an opportunity to appeal the decision.

If an employee's employment is terminated after the expiry of the probationary period, or if the employee is an existing employee who has been transferred or promoted into a different role, the normal capability/dismissal procedure of The Cardiff Circuit must be followed in full.

Last date modified September 2024