

It is the policy of the District to operate probationary periods for new employees, and, in some cases, at the Employer's discretion, in respect of employees who have been transferred or promoted into different posts.

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1. Introduction

The purpose of the probationary period is to offer support and guidance to all new lay 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 Employer 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 so as to ensure that the employee is aware aspects of their performance or conduct are unsatisfactory and prevent the problem from escalating unnecessarily.

2. Length of probation

The Employer's standard period of probation is 6 months. For management, professional positions and roles with complex responsibilities, the Employer may decide on a longer probationary period.

Whatever decision is made the period of probation will be set out clearly in the Written Statement of the Terms & Conditions of each new lay employee.

3. Extending the 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. If an extension to the probationary period is agreed, the Employer will confirm the terms of the extension in writing to the employee, including:

- the length of the extension and the date on which the extended period of probation will end.
- the reason for the extension and, if for 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 (e.g., training) that will be provided during the extended probation period.
- 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.

4. 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. (i.e., the required job outputs or standards of performance.)

5. Mandatory training

To successfully complete their probationary period, all new lay employees and workers will be required to complete elements of mandatory training. For example, this may include, but not be exhaustive to, EDI, Unconscious Bias, Data Protection, GDPR, and Safeguarding.

The elements of mandatory training that are specific to the lay employee's role will be communicated to the new lay employee through the conditional offer of employment letter.

6. Interim reviews during probation

The Line Manager should arrange interim review meetings and assess the employee's performance, capability, and suitability for the role on at least a monthly basis during 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: <https://www.tmc.org.uk/about/data-protection/managing-trustees-privacy-notice>

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.

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. These may include caring responsibilities, periods of maternity, paternity or 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 working arrangements so that the employee is not at a substantial disadvantage when compared to a non-disabled person.

7. 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 the employee misrepresented their abilities in any way, the employer will terminate the employment after prior consultation with the District Lay Employment Secretary.

8. 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 District Lay Employment Secretary 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 District Lay Employment Secretary 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 District Lay Employment Secretary seek to extend the probationary period for a defined period.

Any extension to the probationary period must be with good cause, and the Line Manager must be able to demonstrate the benefits of such an extension.

The Line Manager must inform the lay 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 lay employee.

9. 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 will lead to a satisfactory level of improvement, and after consultation with the District Lay Employment Secretary, the employment will be terminated at the end of the period of probation.

It is the policy of the District 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 District Lay Employment Secretary 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 and dismissal procedure of the District must be followed in full.

This policy has been taken from guidance on www.methodist.org.uk