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Probation Policy

Metanoia Institute

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Related policies
• Anti-Harassment & Anti-Bullying Policy • Disciplinary Policy • Equality and Diversity Policy • Grievance Policy • Whistleblowing Policy
External Reference

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Metanoia Institute Probation Policy

1. Policy statement

The Metanoia Institute believes that a supportive and developmental probation process is vital in providing the appropriate level of support and training for new members of staff on commencement of their employment.

2. Purpose

The purpose of the probation policy is to provide guidance during the probationary period to employees, to ensure that they have the necessary information to allow them to effectively perform their duties to enable successful and continuing employment.

3. Scope

- This policy relates to all new employees of Metanoia Institute, including those on part-time and fixed-term contracts.
- All new employees of Metanoia Institute will undergo a probationary period as outlined in this policy.

4. Definitions

A “probation period” is essentially a trial period of employment during which someone is employed subject to successfully completing their probation.

5. Roles and responsibilities

Metanoia Managers: are responsible for ensuring that the process is followed and where appropriate referred to People & Culture team so that matters are resolved promptly and fairly. All staff are advised to familiarise themselves with this policy and the appropriate Metanoia policies. Any issues related to this policy, please contact people@metanoia.ac.uk.

6. Principles

- The first day of employment will signify the start of the probation period.
- Probation should be monitored via regular review meetings between the employee and Line manager.

- The process should allow for a two-way dialogue between the Line manager and the employee.
- The manager should be reminded at least four weeks before the end of probation that a formal probation review is due.
- Before commencing employment, managers of new employees must ensure that an induction programme is in place at the start of employment.
- The manager is responsible for setting clear objectives for the new staff member on what the manager expects the staff member to be competent within the assigned probationary period.
- Managers will ensure that objectives set are fair and proportionate to hours worked to ensure that staff within any protected groups are not disadvantaged, i.e. part-time workers have a fair balance of workload.
- Managers should schedule one-to-one meetings with new staff members to ensure that staff members are supported and have regular meetings with their manager to discuss progress based on their objectives.
- Managers should ensure that appropriate support and guidance are available to employees and any training implemented.
- Objectives should be agreed by the Line manager and employee and aligned with department plans.
- The various informal and formal review meetings during the probationary period are designed to ensure that the employee is fully informed of their progress. These meetings should be used as an opportunity to discuss progress and put in place any measures to support employees.
- If the employee's performance, attendance, and conduct have been satisfactory, this will be confirmed to the employee in writing, and their probation period will end.
- All employees should be aware of how they are performing throughout the probationary period. No end of probation decision should be a surprise to staff.

7. Length of probation

All new staff at the Metanoia Institute are appointed with a probationary period of four months.

Staff on a fixed-term contract of a shorter duration than the normal probationary period, the probation procedure should be applied, with objectives agreed that are appropriate to the nature of the post and period of employment.

Any period of maternity or adoption leave during a probationary period does not count towards completion of probation. It may also be appropriate to suspend probation during a lengthy period of sick leave (line managers should discuss this with the People & Culture team).

8. Induction

All Metanoia Institute employees who are subject to a probation period must receive an induction programme to introduce them to the Metanoia Institute and help them to settle in. This is arranged by the line manager.

9. Probation timeline

All employees are expected to pass each of their milestone probation reviews and achieve all the required standards of performance, conduct and attendance, and objectives set by the end of their probation period.

Day one: Meet and welcome employee. Line managers should share the welcome checklist with their new employee on day one and direct the employee to the actions required within one week. Line managers should ensure they highlight the mandatory training listed on the welcome checklist which must be completed by the employee to pass their probation period.

Week Two: The line manager should meet with their new team member at the soonest opportunity to set SMART (Specific, Measurable, Achievable, Relevant and Time-Bound) objectives to outline the expectations in their role.

End of Month Two: The line manager should hold the first probation review meeting at the end of month two to discuss progress and provide feedback against the objectives set at the beginning of probation to ensure the employee is 'on track' and check whether the employee has any additional development needs.

End of Month Four: The line manager should hold the second, usually the final, probation review meeting at the end of month four to discuss progress and provide feedback against objectives.

10. Probation review meetings

During the meeting the line manager should invite the employee to discuss their performance in terms of the core responsibilities, objectives and demands of the post. The line manager

should provide constructive feedback (with examples) on progress, achievements and performance.

As part of the discussion, the line manager should assess how the set objectives have been met, discuss any concerns over the employee's performance openly and thoroughly and if necessary, develop a plan of action that will enable the employee to achieve a satisfactory level of performance.

If the review highlights minor problems or concerns, the line manager should ensure the employee is clear on what the issues are and what should be achieved before the next review meeting. The employees should be made aware of any support available to them in the form of training. If the line manager has performance concerns at the initial meeting, an extension to the probationary period may be considered, up to a maximum of five months. This is only appropriate if there is reason to believe that the performance concerns can be addressed, given a little more time.

Dependent on the review discussion, agree and/or revise future objectives, relating them to department objectives. In addition to objectives, they should also discuss any learning and development needs and set a date for the next meeting.

11. Writing up the probation review meeting

The line manager should record the main points and any agreed actions arising from the discussion by updating the probation review document, which should be shared with the employee to ensure their agreement with the written summary.

If the employee is progressing well and no significant concerns have been raised, a record of the discussion should be retained on file for review before the final meeting.

12. Resolving performance problems

Many early performance issues can be resolved through appropriate conversations and the use of development options. It isn't necessary to wait until the mid-point review to address these. The line manager should discuss any areas of concern as soon as they are identified and may wish to hold a review meeting as outlined in paragraph 10.

The People & Culture team are available to discuss possible solutions with line managers and support them through any remedial process they decide to embark on. It is essential that the individual is made aware very quickly and that a clear plan of action is agreed and confirmed in writing. This should include a timeline for improvements to happen and what support the Institute will give in helping the new employee to achieve success. Crucially, the line manager must spell out very clearly what success will look like and how it will be measured.

The probation review meetings will give the opportunity to review progress against the improvement criteria set. If sufficient improvement has not been made, the employee will be made aware of this at the meeting. A further remedial plan may be agreed, with a timeline and achievement goals, and this will be confirmed in writing to the employee. If the issues are sufficiently serious and there is a continued failure to achieve a level of performance, this will lead to termination and must be made clear and confirmed in writing.

If it is possible that termination may result, line managers must consult with the People & Culture team and write to the employee to invite them to a meeting to discuss their performance. This will explain the nature of the ongoing performance issues and offer them the right to be accompanied by a work colleague or trade union representative.

The meeting will:

- provide evidence/examples of the problem/issues to be discussed.
- allow the employee to respond to their concerns and to ask any questions.
- ensure that due consideration has been given to issues pertinent to the individual case.

Once all the information has been gathered the meeting should be adjourned for consideration to be given to all the evidence and for a decision to be taken.

Termination of employment during the probation period (original or extended) will be subject to a one-week notice period or pay in lieu of notice where appropriate.

If the problems are of a conduct nature this process may well be shortened, particularly if they fall into the category of gross misconduct. Any concerns regarding conduct should be discussed with People & Culture immediately as they arise.

13. End of probation

After the final review, if the line manager is satisfied that the employee has completed their probation, they must confirm this with the People & Culture team who will then arrange for an end of probation letter to be sent to the employee.

14. Monitoring and Review

People & Culture team are responsible for monitoring the effectiveness of this policy and supporting procedures and will conduct reviews at appropriate intervals.