

Probation Guidance for Line Managers 2026-27

Document Owner: Grace Foundation

Approved by: Grace Foundation SLT

Version: 1

Security Classification: Internal use only

Probation Guidance for Line Managers

This document provides a simple guide for line managers on managing probation periods consistently and effectively. It outlines the key responsibilities, timescales and processes from an employee's start date through to confirmation of employment.

How long is probation?

- Our standard probation period for all new employees is 3 months.
- As your staff member approaches 3 months with GF, you will receive a reminder from cascade that their probation review meeting is due.
- Probation periods may be extended up to a maximum of 6 months. After this point, a decision should be made regarding the employee's continued employment.

What should happen during the probation period?

As a line manager probation should be considered as a period of support and assessment, rather than a simple pass or fail exercise.

1. Give them a strong start
    - Ensure induction is completed.
    - Introduce key colleagues and stakeholders.
    - Ensure the employee has access to the equipment, systems and resources they need.

2. Set clear objectives from the start
    - Agree specific objectives within the first few weeks
    - Explain what good performance looks like
    - Ensure that these are all realistic & achievable

3. Meet regularly & provide feedback
    - Meet at least once per week during probation
    - Discuss progress, challenges and development needs
    - Keep brief notes of the conversations and any agreed actions
    - Recognise achievements and address concerns promptly
    - Signpost resources and support available (e.g. Lead Practitioners)

4. Monitor performance and conduct
    - Regularly review progress against objectives and core competencies
    - Monitor attendance and timekeeping
    - Complete return to work interviews where required
    - Update our formal GF Line Management system at least once per month

5. Act early if concerns arise
    - Don't wait until the end of probation to raise issues
    - Clearly explain concerns and expectations
    - Put appropriate support in place
    - Seek advice from Cluster Lead where needed

No employee should be surprised by the outcome of their probation. By the end of the probation period, they should have received clear expectations, regular feedback, appropriate support and sufficient opportunity to improve.

Criteria for successfully passing probation

An employee will be considered to have successfully passed their probation period when they consistently demonstrate that they can perform the requirements of their role and meet the standards expected by Grace Foundation.
Employees should be assessed against:

- Performance
- Behaviour and values
- Attendance and timekeeping
- Engagement and development
- Compliance with policies and mandatory training

An employee will normally pass probation where they demonstrate acceptable standards across all of these areas.

What is the process for passing, extending or not passing probation?

1. Schedule the meeting in the diary in advance.
2. Discuss performance, achievements and any development areas.
3. Confirm one of the following outcomes:

- **Probation passed** – employment confirmed in line with company procedures.
- **Probation extended** – further time is required to demonstrate the required standards (up to a maximum of 6 months since start date)
- **Probation not passed** – further action to be considered in line with company procedures (see below)
- **Further review required** – additional information or discussion is needed before a decision is made.

4. Update cascade with the relevant outcome
5. Where extending probation, consult your Cluster Leader beforehand.

When and why a probation period might be extended or failed

Probation may be extended where an employee has not yet consistently demonstrated the required performance, behaviours, attendance standards or competencies, but there is a reasonable expectation that these can be achieved with additional time and support.

Where probation is extended you must provide the following:

- Reason for extension:
- Areas requiring improvement:
- Support and training to be provided:
- New probation end date:
- Next review meeting date:

Where you do not think extending probation will improve the situation and you have a very clear reason/s to do so, you can opt to fail their probation and thereby end their employment with GF. Where this is the case, you MUST speak to your cluster leader in advance and discuss the reasons etc with them. They must also be in attendance when you have the end of probation meeting. The persons employment would then end that day. Please seek advice in advance before you do this.