



PROBATION GUIDANCE FOR LINE MANAGERS

New staff members joining the SU have a probationary period at the beginning of their employment with the SU. This is normally 6 months, however is 12 months for Director and Deputy Director positions. The purpose of the probationary period is to ensure that new joiners receive adequate induction and training in their role, and into the family, and also that performance can be monitored on a regular basis. This will allow any problems to be resolved at an early stage, and to allow any inability to meet the requirement of the role, or the SU to be recognised and acted upon promptly. It is vital that Line Managers are actively involved in the work of staff members on probation, ensuring that they are fully supported during this period, and that they are having regular meetings with the individual. These meetings should be used to discuss performance, understanding of role, highlight problems and to provide support, advice and guidance as well as identifying potential training needs. It's important to remember the probation is a two way process which involves helping them to settle into their role, department and the wider SU. You need to make sure that you are helping them to understand and feel comfortable with the culture of the SU.

MID PROBATION

Line Managers will be asked to provide written feedback at the half way point of the probationary period (for senior posts this will be every 3 months) on the staff member's overall performance in role. It is expected that this feedback will be informed by regular 121 meetings and ongoing monitoring of progress.

HR will also meet with the staff members at this point in the process to have an informal chat about how they feel they are settling in, whether they are enjoying the role and feel they have sufficient support and training to succeed.

MANAGING ISSUES

If you have issues, or concerns about a staff member at any point during their probationary period you must raise them directly with the staff member immediately. The probationary period provides a fixed period of adjustment for a new staff member and it is vital that they have maximum opportunity to make adjustments or improvements to their work. Ensure that you are documenting these conversations, and any agreed actions through your 121 meetings. The staff member must have been clearly informed of any targets they need to meet to pass their probationary period.

If at any point you feel that a staff member may not successfully complete their probationary period you need to discuss this with your Senior Manager, and a member of the HR team as early as possible.

END PROBATION

As you reach the end of your staff members' probationary period you will be expected to provide written feedback to confirm permanency. If everything is going well your feedback will be taken to the next Staffing Committee meeting who will confirm permanency. HR will then write to the staff member and they will officially become a permanent member of the family.

MANAGING ISSUES

If the issues or concerns you have about a staff member have continued, or they have not met their clearly set and communicated targets you may need to think about termination of employment. This is a serious decision and is not to be taken lightly. You must be able to evidence

- That the staff member has been made aware of the concerns
- That the staff member has been set appropriate and achievable targets to improve
- That the staff member has been provided with appropriate supervision, support and training to enable them to meet the targets set
- That the staff member has not made sufficient improvement within the allocated timescale

It is important that any concerns are raised and dealt with in a timely manner. If you leave the matter and do not have time to set appropriate goals you will have no option other than pass to probation and deal with the issues via the performance management process. It is possible to extend a probationary period if the staff member has made good progress in achieving targets but is not quite there yet. Again this must be in line with the required evidence above and must be in good time prior to the end of the probationary period.

If all options have been exhausted and termination is deemed to be the only route open for a staff member please liaise with the HR team who will support you through this process.

This guide is intended to support you manage the probationary periods of your staff members. If you have any further questions please do not hesitate to contact the HR Team.