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| New Logo 2 | | | | | Barnardo’s  Corporate Policy |
| **Probationary & Transition Periods Policy Statement** | | | | | |
| **Risk Owner:** | | | Director of People & Culture | | |
| **Supported by:** | | | Employee Relations & Policy Manager | | |
| **Date Approved:** | | | 1 July 2022 | | |
| **Date for Review:** | | | 1 July 2025 | | |
| **Distribution** | | | Not confidential - for internal use only | | |
| 1. **Policy** | | | | | |
| New employees joining Barnardo’s or existing employees moving to a different role within the organisation are subject to a probationary/transition period as set out in their written statement of terms and conditions of employment. This policy has been designed to ensure that:   1. All new employees including those of fixed terms contracts complete a probationary period (PP), and their [mandatory training](https://inside.barnardos.org.uk/bu/learning-all/mandatory-training), before they are confirmed in post. (For employees with a fixed term contract or funding end date shorter than the standard probationary period of 26 weeks, the normal probation process will be followed for the duration of employment). 2. Existing employees moving to a new role are managed through a transition period (TP). 3. Employee’s PP/TP are managed fairly and consistently in line with this policy and the Probation & Transition Periods procedure (see [Probationary and transition periods Inside Barnardos](https://inside.barnardos.org.uk/employee-and-volunteer-support/performance/probationary-and-transition-periods-policy)). 4. A meeting is required to agree initial objectives as well as required and mandatory training. In addition to regular one to ones/supervision, suitability for the role is then assessed formally at 13 weeks and 26 weeks using the Probation & Transition Agreement form. 5. The Probation & Transition Periods procedure may be used at any time during the PP, to support managers and employees where there are concerns regarding suitability to the role relating to unsatisfactory performance, misconduct, attendance etc, including capacity for extending the PP or options for ending the employment. Any act(s) of serious or potential gross misconduct will be addressed through the Disciplinary Procedure. 6. Managers with concerns about the suitability of an existing employee during the TP must use the relevant Barnardo's procedure e.g., performance improvement, disciplinary, sickness absence, etc. 7. Employees are aware that their PP/TP is only completed when they have received written confirmation from their People Team or their manager. 8. Eligible employees who successfully complete a probationary period will receive the next Single Annual Pay Award (SAPA) increase applicable to the role usually in the April following completion of probation. (However, for SAPA 2022, the eligibility criteria was revised for those commencing employment between 2 October 2021 and 31 March 2022, please refer to [Frequently Asked Questions Single Annual Pay Award Apr 2022.docx (barnardos.org.uk)](https://livelink.barnardos.org.uk/otcs/llisapi.dll?func=ll&objId=350991523&objAction=viewheader) 9. Eligible employees in transition will receive applicable SAPA increases during the TP. 10. All employees work in ways consistent with our Values and the behaviours that reflect these, (see Barnardo’s [People and Culture Strategy)](https://cms.barnardos.org.uk/sites/default/files/2022-07/People%20and%20Culture%20Strategy.pdf) including our Leadership and Management Behaviours framework for those employees in management roles. 11. Equality, diversity and inclusion (EDI) is promoted, and employees are expected to adopt a positive approach to diversity and challenge discriminatory attitudes and behaviour. | | | | | |
| 1. **Scope** | | | | | |
| The policy applies to all newly appointed Barnardo's employees, including those on fixed term employment contracts.  All existing employees in a new role, including secondments and alternative roles to redundancy, are subject to the monitoring and review arrangements set out in the procedure.  The policy does not apply to 'as and when’ workers, agency workers and self-employed contractors/consultants or volunteers. | | | | | |
| 1. **Definitions and Key Concepts** | | | | | |
| **Probationary Period (PP) –** Initial period of employment with Barnardo’s, prior to confirmation in writing of successful completion of the PP.  **Transition Period (TP) –** Initial period when an existing employee is transitioning to a new role within Barnardo’s.  **Probationary & Transition Agreement Form –** Form used by managers and employees to monitor, review and record objectives and progress during PP/TP. | | | | | |
| 1. **Responsibilities and Roles** | | | | | |
| **Line managers**  **Employees**  **People Teams**  **People Strategy and Projects Team** | | Responsible for managing the probationary /transition periods of employees who report to them using the Probation and Transitions Periods Procedure. This includes:   * setting performance and development objectives to be achieved during the PP/TP; * regularly monitoring and giving feedback on these during supervision/one to ones; * ensuring that employees understand what is expected of them during their employment; * providing the information and organising any support/training/learning and development required for the employee to achieve these expectations; * ensuring that every new employee reporting to them completes their mandatory training during their PP; * completing formal reviews at 13 and 26 weeks; * raising concerns promptly and exploring the reasons with the employee, giving appropriate support, if problems are identified during the PP/TP; and * seeking advice from the People Team at an early stage.   Responsible for:   * fully engaging and actively participating in the PP/TP process; * completing all identified support/training/learning and development, mandatory training and induction programmes in the timescales set; and * asking for additional support where required as soon as possible.   Responsible for supporting managers and employees to understand and implement Barnardo's policies and procedures; for checking that employees who have successfully completed their PP/TP have received written confirmation of this; and supporting managers to address any issues identified during the PP/TP.  To review and update this policy in accordance with Barnardo’s Central Policy register at three yearly intervals although any legal or organisational developments may prompt more frequent reviews. Proposed changes will be subject to consultation with UNISON. | | | |
| 1. **Associated Legislation, Guidance, References and Documents** | | | | | |
| * Probationary and Transition Periods Procedure June 2022 * Probationary and Transition Agreement form 2022/23 version * Performance Development Review (PDR) Policy 1 April 2022 - 31 March 2023 * PDR Form March 2022 version * PDR FAQ document current version (May) 2022 * Performance Improvement Policy * Flexible Working Policy * EDI Policy and Action Plan * Disciplinary policy and procedure | | | | | |
| 1. **Compliance and Oversight** | | | | | |
| In addition to the compliance and oversight arrangements set out under Roles and Responsibilities, the following applies:   * The Risk Owner will ensure that management information demonstrating adherence to and compliance with this Policy is produced and provided to relevant parties as required and on request complete a business self-assessment. * The Audit and Assurance Team will periodically and independently review adherence to and compliance with this Policy and associated procedures and processes across the Charity in line with their approved audit and inspection plans. | | | | | |
| 1. **Document History** | | | | | |
| **Version** | **Date** | | **Author** | **Comments** | |
| 1 | 30.06.2022 | | People Strategy & Projects Team | Introduction of separate Policy statement for Probationary & Transition Periods including minor updating. | |
| 1.1 | June 2024 | | People Strategy & Projects Team | Date review only to July 2025 in agreement with Audit and Assurance. | |