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| **PCC/PARISH LOGO** | PCC/PARISH NAME  **New Employee**  **Induction and Probationary Review form** |

**BD21328_**

Induction - Line Manager Responsibilities

An employee’s first impressions of an organisation have a significant impact on their integration within the team and job satisfaction. Induction is an opportunity for an organisation to welcome their new employee, help them settle in and ensure they have the knowledge and support they need to perform their role.

It is important from an employee wellbeing perspective, that we onboard new employees in a structured and effective way, providing the training and networking that they need to successfully pass their probation period, and be engaged and motivated in their employment with us.

Whilst every induction will need to be tailored to the needs of the new employee and the type of role that they will be doing, following the schedule below will help to allay any fears or anxieties that the new employee has, and allow them to understand how their role fits with the organisations aims, and how their induction and probation period will be planned out for them.

## 3/6 Month Probation Process – Line Manager Guidance

Your first meeting with your new employee should focus on the Induction of the employee into the organisation, and a discussion about the role, your expectations of the employee in terms of what you want them to achieve, and the behavioural expectations in line with the PCC/PARISH policies. It is also to ensure that they have a clear and supported pathway to success within their probation period.

This will give the employee direction, and a clear plan of the help that they will receive at each stage of the probation period and will identify where training and support is needed to enable them to be fully skilled, and happy by the end of the three/six-month period.

A review meeting should be held at the end of the first month, third month and sixth month following the employee’s commencement of the role to regularly check how the employee is settling into their new role, if they have any concerns or queries, and if they need any other training and support to keep them on track.

The meeting should be a positive experience for the new employee and should focus on their successes and achievements firstly. You should use a supportive approach for areas which have been identified as needing development, to keep the new employee motivated.

By the end of the three/six-month probation period the employee should be achieving the following:

* They should be able to competently complete the basics of the role;
* Show strong ownership of the role and any deadlines within their scope,
* Have a good grasp of the Diocese and how their role fits with our aims,
* Have developed good working relationships with key clients and stakeholders.

Typical examples for discussion with the employee throughout this process are:

* A discussion on how they are feeling about their role including:
  + their wellbeing,
  + the demands of the job,
  + their work/life balance,
  + What elements of the role they are enjoying
  + What elements of the role they are not enjoying or finding difficult

* Feedback on their performance since the last review. What are they doing well/ what could they be doing better and how can they achieve this,
* Are they meeting the deadlines laid out according to the role description, and whether the expectations/deadlines placed on them feel reasonable at each stage, and if they need assistance with their workload,
* How they plan their workload, and if they need any support with understanding conflicting priorities
* What training and support have they/you identified, and how/when they will receive this?
* Is their attention to detail at the level required of their role. If not, how can they be supported, and are there underlying issues affecting this?
* Re-adjust any time scales set for the employee to achieve specific aims if necessary
* Discuss any new objectives if applicable and when the new employee should meet them by

At the end of each meeting, try to end on a positive note, and let the employee know that they can speak to you at any time before the next meeting if they have any queries or require further support or help.

**Decision at the end of the three/six-month period**

If the employee has passed their probation period, then you should notify the administrator/relevant person and send a copy of the completed form to be stored on the employee’s Personnel File.

The administrator/relevant person will then write to the employee to confirm that they have passed their probation and are a permanent member of staff.

If the employee has not passed the probation period at the end of three/six months, and there is a reasonable expectation that they could pass their probation period with more training and support, then we will extend the period by a further three months. In this instance HR will write them a letter confirming that their probation period has been extended. You should continue to meet with the employee monthly, or more frequently and ensure that training and support is given to help the employee.

It is important that if you feel that the probation period needs to be extended, that you communicate this decision to the employee and to the administrator/relevant person before the date of their 3/6 months of employment, as once this date has passed, the employee is automatically considered to be a permanent employee.

If the employee has not passed their probation period, and it is not reasonable to expect that they would with further training and support, then their employment will be terminated with the relevant notice paid to them.

If at any point during the process the manager is uncertain on the decision to be made, they should consult with their line manager/ administrator/relevant person or HR.

The first thing to do is to ensure that all of the below are set up and covered in the induction with the employee.

You can use this checklist to ensure that everything is set up ready for the employee before they join:

Checklist for new Employee Induction and Probation Period

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| **To do** | **When** | **Who** | **Date completed** |
| Speak to IT and ask for IT, email account and relevant network access to be set up and a door fob for the new employee, including access to relevant car parks if needed. Ask the IT Manager to schedule some time in the diary to go through the IT equipment with the new employee. Do this as soon as the employee has accepted the role to give the IT Manager time to prepare and order any necessary equipment | Pre-Start date | Line Manager |  |
| Ensure a desk and chair is allocated to the employee if they will be office based | Pre-Start date | Line Manager |  |
| Ensure a date and time is allocated to complete a HR and Health and Safety Briefing – This is usually 9am on the employees first day to ensure that the employee has the relevant paperwork and right to work documents with them. The HR & Health and Safety Induction should typically take 1 hour. | Pre-Start date | Line Manager and HR to liaise |  |
| Decide on 5 objectives that you want the employee to achieve in the first 6 months of their employment and record them in the dedicated objectives section below. | Pre-Start date | Line Manager |  |
| Create a written plan for the employees first 1-2 months to:   * give them guidance on what tasks they are likely to need to do * set up any networking meetings with key people who the employee will work with * Add in training time with you or other employees, and ensure to give them some free time to work through anything that they have learnt * Add in time for the employee to complete a DSE Assessment (Approx 30 minutes) * Add in time for the employee to complete any eLearning courses /training * Schedule probation review meetings of 1-2 hours per meeting. These should be at the end of month 1, end of month 3 and end of month 6. Please record these dates in the “Employee Induction and Probation” section below | Pre-Start date | Line Manager |  |
| Communicate with the new employee about where to go and what time they should meet you on their first day, including ensuring that employee brings relevant documentation on their first day. | Pre-Start date | Line Manager/ Administrator/Relevant person |  |
| Meet employee for HR & Health and Safety Induction | On first day | Line Manager/ Administrator/Relevant person |  |
| Meet the new employee to discuss the following:   * The structure of the induction and probation program itself so that the employee has full visibility of how this will be delivered * When the employee and Line Manager will meet to discuss progress during the probation period 1, 3 and 6 months) * The culture and character of the Diocese and the PCC/PARISH staff * The start/finish time each day and lunch break time for the new employee, and the attendance expectations * The structure of the team in more depth, and how the new employee’s role assists in the success of the team, the Parish and the wider Diocese * Walk the employee through their job description and the 5 objectives that you have set for them to achieve in their first 6 months. * Talk through the written plan you have created for their first 1-2 months of employment including any networking meetings and why those relationships are key to the role * Discuss any training needs or support that is required and will be provided to enable the employee to do the role | On first day | Line Manager |  |
| Show employee to their desk and arrange for the IT Manager to come and show the employee their IT equipment, and hand them any fob/access cards. | On first day | Line Manager and IT Manager |  |
| Show the employee where to access the Staff Handbook and other policies in particular asking the employee to read the following policies as soon as possible:   * Equal opportunities and Positive Working * GDPR * Internet and Network Security * Social media policy | On first day | Line Manager |  |
| Probation Review Meeting - 1 | End of first month of employment | Line Manager |  |
| Probation Review Meeting – 2 | End of third month of employment | Line Manager |  |
| End of Probation Review Meeting (must be held just prior to the end of the employees 6 month probation period) | End of sixth month of employment | Line Manager |  |
| Send completed Probationary review form to administrator/relevant person to raise the relevant letter for employee | Following Probation Review meeting | Line Manager |  |

Logo, company name

Description automatically generated

**EMPLOYEE INDUCTION AND PROBATION**

**BD21328_**

It is standard practice at the PCC/PARISH NAME to review an employee’s performance on a regular basis, from the start of employment to the end of the three/six month probation period.

The purpose of this document is to ensure that you have a good induction, set initial objectives and expectations for your first six months of employment, and provide you with written feedback on your performance throughout the probation period, and to ensure that you have the necessary support and training to enable you to be successful and happy in your new role, and at the end of the six months, to pass your probation period. This will all be covered in your induction meeting with your line manager.

Each meeting after this will be to discuss your experience so far, your wellbeing, how well you feel you are achieving to date, to review your objectives and expectations, and to look at any further support or training needs that you have.

**Employee Name:**

**Job Title:**

**Line Manager’s Name:**

**Date of each review meeting:**

|  |  |
| --- | --- |
| **Month** | **Date of meeting** |
| Induction meeting |  |
| End of 1st month |  |
| End of 3rd month |  |
| End of 6th month |  |

**Objectives and Expectations in first 3/6 months**

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| **Discussion on how the employee is feeling about the role, and any concerns or worries** |
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| **Discussion on the Line Manager’s expectations of the employee during the first six months** |
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| **1) Objectives and Expectations**  Any objectives and expectations that are set should be SMART (Specific, Measurable, Achievable, Realistic, Timely) written so that they specify a measurable outcome, that is achievable and relevant to your post, and can be achieved in your first 6 months of employment | | | | |
| **Objectives/ Expectations** | **Key actions/ Training to be undertaken** | **Review at end of month 1** | **Review at end of month 3** | **Review at end of 6 month probation period** |
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**End of 1st month of employment**

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| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
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| **Feedback from the Line Manager on the successes and achievements of the employee’s first month** | | | | |
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| **Discussion on where any additional support and/or training may be needed** | | | | |
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| **Any additional comments from the employee** | | | | |
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| **Any additional comments from the line manager** | | | | |
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**End of 3rd month of employment**

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| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
|  | | | | |
| **Feedback from the Line Manager on the successes and achievements of the employee’s third month** | | | | |
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| **Discussion on where any additional support and/or training may be needed** | | | | |
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| **Any additional comments from the employee** | | | | |
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| **Any additional comments from the line manager** | | | | |
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**End of 6th month of employment – Final probation review meeting**

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| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
|  | | | | |
| **Feedback from the Line Manager:**   * **Has the employee met the objectives and expectations of the role?** * **Has the employee successfully passed their probation period?** * **Have any further actions/training needs been identified to assist the employee in their employment?** | | | | |
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| **Any additional comments from the employee** | | | | |
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| **Any additional comments from the line manager** | | | | |
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**To be completed by the Line Manager:**

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| **Status of probation period** | **Please tick to confirm outcome** |
| **Employee has successfully passed the six-month probation period and is now a permanent employee of the PCC/PARISH.**  **(Explain to employee that a letter will be sent from HR to confirm this)** |  |
| **Employee’s probation period has been extended by a further three months**  **(Explain to the employee the process for the next three months, and the revision of any objectives or expectations and their timescales. Also confirm what additional training or support will be provided to the employee to help them in their extended probation period. A letter will be sent from the administrator/responsible person to confirm these details)** |  |
| **The employee has not passed the probation period, and it is not reasonable to believe that with an extension to the probation period, and additional training and support, the employee will pass.**  **(The employee will then be given a letter from administrator/responsible person to confirm that they have not passed their probation period, and their employment will be terminated with the relevant notice pay)** |  |

**The employee and Line Manager must sign the below to confirm that the induction meeting and probationary reviews have been held and that a final decision has been reached regarding the employee’s continued employment with the PCC/PARISH:**

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| --- | --- |
| **Employee** | **Line Manager** |
| Name: | Name: |
| Date: | Date: |
| Signature | Signature |