



Central England Area Quaker Meeting

Induction and Probation for Staff 2018

1. *Scope and Purpose*

This procedure outlines guidance on the induction of all staff¹ new to Central England Area Quaker Meeting (CEAQM) and for their support, training and assessment within their probationary period. Staff returning after a period of absence will receive an induction (if required) appropriate to their individual needs as will employees who may need special attention, such as school and college leavers, employees with disabilities. Sensitivity will be shown to the cultural or religious needs of people from ethnic minorities.

2. *Introduction*

- (a) It is CEAQM policy that all staff, including those on part-time and fixed term contracts, who are new to CEAQM, undergo an induction and probationary period during which they will be introduced to the main duties and responsibilities of their post, the performance standards expected of them, the colleagues with whom they will be working most closely and the context of their work, within the Local Meeting or Branch (LM/B), and CEAQM as a whole.
- (b) During the probationary period the onus is on the Line Manager to provide the necessary information and training that will equip the individual to undertake all aspects of their role at CEAQM; and on the individual to demonstrate their suitability for the post. Line Managers must ensure systems are in place to support and monitor the employee's work throughout the probationary period in order that s/he receives such assistance as is reasonable to fulfil the duties and responsibilities of the post.
- (c) Probationary periods at CEAQM are usually 6 months, but can be shorter, depending on the length of the contract.

3. *Induction*

It is the Line Manager's responsibility to ensure that staff new to CEAQM are given all the information necessary, as soon as possible, to enable them to commence work and that they are provided with a copy of, and briefed on, all relevant employment policies and procedures and any other CEAQM procedures relevant to their work, as well as the Written Statement of Terms and Conditions of Employment (i.e. their contract). They will be introduced to their immediate colleagues, one of whom can act as a guide to the new recruit to introduce them to facilities in the workplace. The new starter should be given enough information to understand any particular health and safety requirements to be able

¹ In this document, the word "staff" applies to all employees and regular volunteers.

to work in a safe and healthy manner. As part of the induction process, the Line Manager should discuss the individual's training needs with them and book them on to mandatory training and any other training essential to the post, within the first six months.

See [Appendix 2](#) for an induction checklist.

4. Probationary Procedure

- (a) As the job is explained to the new employee the Line Manager must make clear any service standards relating to the work of the Local Meeting or Branch within which the employee works and the performance standards related to their particular post in terms of:
- quality standards
 - skills that must be acquired
 - deadlines which must be met and how any changes to deadlines will be communicated
 - working relationships that must be developed with other staff, visitors, users, etc.
- (b) The Line Manager must also make clear how these standards will be monitored in the probationary period through monthly supervisions with a formal review at six months (or the end of the probationary period if this is shorter). It is the Line Manager's responsibility to undertake and record this review. There is an End of Probationary Period Review form which may be used for this review.
- (c) In the case of fixed term staff with a contract shorter than six months the probationary process will be set with regard to the length of the contract (e.g. a three month fixed term contract will normally have a review date set at 6 weeks and include fortnightly supervisions).
- (d) At the six month probationary review the Line Manager will formally discuss the employee's performance with them and summarise the discussion in writing. The employee will add their comments to the written assessment. Where performance is satisfactory, the Line Manager will pass the assessment to his or her line manager or to the relevant management committee² for approval. The Line Manager will then write to the individual to confirm satisfactory completion. A copy of the probationary review will be kept on the personnel file. After this the employee's performance will be reviewed in line with supervision and appraisal and performance management policies
- (e) If during supervision an employee's performance is not satisfactory in any way, the Line Manager must discuss this with his/her line manager or the relevant management committee. A formal plan should be set with areas for improvement and set clear objectives and timescales. The Line Manager should then meet with the employee and explain the details of this and the employee should be asked if they consider that any further reasonable assistance and/or training is necessary to enable them to complete tasks to the standards expected of them. The employee should sign the supervision form and receive a copy of it to confirm that they have been made aware of the improvements required, the timescale and the implications should there be insufficient improvement. A copy should be retained on the employee's file.

² See Appendix 1: Definitions for "Relevant management committee".

- (f) If at the six month review performance is still not satisfactory, the Line Manager must speak to his/her line manager or the relevant management committee. A meeting should then be arranged and the employee informed in writing giving, where possible, at least five working days' notice and the right to be accompanied by a colleague or Trade Union Rep. It is advisable to ensure that the Clerk of the relevant management committee, or delegated representative, is present at the meeting in addition to the Line Manager who conducted the review. At this meeting a full review of progress should be held and a decision made to either extend the probationary period, or alternatively, to terminate the appointment. Any decision as a result of such meeting should be confirmed in writing to the individual by the Clerk of the relevant management committee.

5. Extension of Probationary Period

- (a) It may be appropriate to extend the probationary period if, for example, the employee has not performed satisfactorily but the Line Manager has evidence to suggest that performance is likely to improve with a further period of probation.
- (b) In all cases where probation is extended the following must be discussed between the Line Manager, the Clerk of the relevant committee and the employee and confirmed in writing:
- The reasons for the extension.
 - Any assistance/training that will be given in the extension period.
 - The period of the extension, the performance standards expected and the way in which performance will be monitored.
 - That if performance still fails to meet expectations at the end of the period of extension, employment will be terminated.
- (c) Probationary periods should not normally be extended by more than 13 weeks.
- (d) Employees will have the right to appeal against a decision to terminate their employment for failure to satisfactorily complete their probationary period. An appeal must be lodged in writing with the Clerk to the relevant management committee within ten working days [is this time table realistic?] of receipt of confirmation of termination. The appeal will normally be heard by two CEAQM Trustees. At such an appeal the employee has the right to be accompanied by a trade union representative or work colleague.

6. Appraisal and Performance Management during the Probationary Period

CEAQM's Appraisal and Performance Management Policy and Procedures apply to staff who have successfully completed their probationary period. For staff on probation this Induction and Probation procedure applies in relation to under-performance.

7. Notice Period

During the probationary period, employees may terminate the employment by giving one week's notice. CEAQM may also give one week's notice to terminate employment.

8. Staff Promotion (not relevant to job role change as a result of restructuring)

When a member of staff is recruited to a more senior post or a new position there will be a trial period of three months. During this time the member of staff will receive regular supervision in the same manner as a new employee. If during the trial period there are any concerns these need to be dealt with as above. Should the trial period be unsuccessful the member of staff would return to their previous position and the post be re-advertised.

Appendix 1: Definitions

Relevant Management Committee

For wardens, caretakers, etc., this will probably be the Premises or Property Committee of the Local Meeting. For other employees of Local Meetings, it is advisable for the Business Meeting to set up a committee that the Line Manager will report to. Other committees in line management include Northfield Eco Centre Committee (or its Employment Sub-Committee), the West Midlands Quaker Peace Education Project Steering Group (or its personnel sub-committee), Northfield Development Committee, and CEAQM Trustees. This list is not exhaustive.

Staff / employee

is here defined as someone paid a wage or salary for work that they undertake. It excludes people who undertake work on a self-employed basis or contractors taken on to undertake a specific task (e.g. builders, plumbers, etc.).

The policy and procedures may also be used in the management of regular volunteers – those recruited and appointed with an agreement to undertake specific tasks.

Appendix 2: Induction checklist for staff and volunteers

Essential

Provide a copy of the Employee Handbook
Introduction to CEAQM and close colleagues on first day
Personnel documentation and checks completed, receipt of P45
Written terms and conditions issued (i.e. contract of employment) Hours, breaks and method of payment
Health and Safety Policy and Procedures
Lone Working Risk Assessment as required
Emergency and fire procedures for workplace
First Aid and reporting of accidents / incidents
Arrangements for holidays and other leave
Sickness absence reporting procedures, etc., are set out in their contract, but see also “Management of sickness absence and long-term ill-health” if necessary
Safeguarding Policy and Procedures and key contacts for reporting safeguarding matters
Time sheets (if used) and an Annual Leave and TOIL Record Sheet
Pay and pensions (for paid staff)
Key personnel and line management structure
Appraisal and Performance Management Policy and Procedures
Guidance on Expenses Claims, and claim form
Quaker structures and decision-making processes
Supervision Policy and Procedures (in preparation) – we still do not have this

Training needs, objectives and provision

Ensure these are available but deal with specifically as appropriate

Disciplinary Policy

Grievance Policy

Equalities Policy

Manual Handling Awareness guide and Power Point presentation

Working with VDUs

Service Occupancy Agreement

Maternity, Paternity and Parental Leave Policy

Flexible working Policy

Volunteer Policy

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