

CABINET
4th AUGUST 2026

COUNCILLOR GAYNOR AUSTIN
FINANCE & RESOURCES PORTFOLIO HOLDER

KEY DECISION: NO

REPORT NO. PEO2602

NEW EMPLOYEE PROBATION POLICY

SUMMARY AND RECOMMENDATIONS:

This report presents the new Probation Policy for consideration and approval by Cabinet.

The Policy provides clear formal expectations, roles and responsibilities and guidelines for the new employee and Line Manager during the 6-month probation period.

Recommendations:

That Cabinet

- i. Agree the proposed new Probation Policy (Annex 1).

1. INTRODUCTION

- 1.1 This report presents the Council's new Probation Policy for approval.

2. BACKGROUND

- 2.1 Line Managers currently follow the Council's Managers' Guide to Probation which sets out the roles and responsibilities of both new employees and Line Managers and guidance for assessing the performance for a new employee during the 6-month probationary period.
- 2.2 It is recommended that the new policy is implemented to strengthen the process for all new employees joining Rushmoor Borough Council. The policy will also provide Line Managers with clear guidance of what is expected in their role during the probation period.

3. PROBATION POLICY

- 3.1 The new Probation Policy specifically outlines for the new employee the following:
 - Clear expectations set from day one of employment at Rushmoor Borough Council.

- Formal review meetings to be held during the first 6 months of employment.
- Timely feedback and support to be provided to the new employee.
- Difficult conversations scheduled if required.
- Any performance or behaviour that is not meeting expectations to be addressed at the earliest opportunity.
- Written records maintained for:
 - Objectives and expectations
 - Performance and conduct
 - Any required training and development
 - Monitoring of absence and timekeeping
 - Feedback from employee
 - Confirmation of employment once probation period ends

3.2 The roles and responsibilities for new employees and Line Managers are as follows:

New employees should:

- Demonstrate commitment to developing the skills and experience needed for the job and attend any training required.
- Comply with all Council policies and procedures.
- Seek support as required from their line manager, colleagues and where appropriate mentor.
- Attend the induction programme as soon as possible after joining – the People Team will arrange this.
- Attend any probationary/one to one meeting when invited.

Line Managers should:

- Ensure the new employee is aware of the Probation Policy and how, when and why their progress will be monitored.
- Provide advice, support and supervision.
- Ensure that the relevant training and guidance is provided.
- Set the new employee objectives soon after joining.
- Identify any areas of concern and discuss and agree with the employee how these will be addressed.
- Meet regularly with the employee to review progress and ensure probation paperwork is completed.

3.3 The new Probation Policy has been discussed with managers and Unison have been provided with the policy for comment.

4. IMPLICATIONS

Risks

- 4.1 The purpose of the implementation of the policy is to provide clear process guidance for new employees and Line Managers regarding the performance expected during the probationary period.

Legal Implications

- 4.2 There are no direct legal implications associated with this report.

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Financial Implications

- 4.3 There are no direct financial implications with the adoption of this policy.

Peter Vickers CFO s151 15th July 2026

Resource Implications

- 4.4 There are no additional staffing or resource implications from this report.

Equalities Impact Implications

- 4.5 An equality impact screening assessment was undertaken and it was determined that a full Equalities Impact Assessment is not required because the impacts are positive or neutral. that this proposal would have a positive or neutral impact on people with protected characteristics. Therefore, a full assessment is not required.

Climate Change Implications

- 4.6 A Climate Change Screening Tool was undertaken and found no significant Impacts and therefore a full impact assessment was not required.

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LIST OF ANNEXES

- Annex 1 – Probation Policy
- Annex 2 – Equality Impact Assessment

Probation Policy

June 2026

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Procedure for Probationary Periods for a New Employee

1. Introduction

Rushmoor Borough Council (the Council) is committed to ensuring that it makes clear its expectations and provides the support needed for employees to meet the standards of performance, conduct and attendance required during their probation period and beyond. Managers will monitor, assess, and support all new employees to assist them in demonstrating their suitability to undertake the full duties of their new post.

2. Purpose and Objectives

2.1 The aim of this policy is to ensure that managers have clear procedures to follow and that they understand their responsibilities in the process, so the Council meets legislative requirements and compliance as well as organisational needs. The Council aims to secure equality of opportunity in all its activities; the probation process must be objective, clear, transparent, and free from discrimination.

2.2 Every **new** employee will have a 'settling in' period in their new role. Probationary periods provide an opportunity for the Council and the employee to establish their suitability for the role.

2.3 The Council will provide advice and guidance to the employee to help them become familiar with and competent in performing the work they have been appointed to do.

3. Scope

3.1 This policy applies to all new employees of Rushmoor Borough Council, including those with previous local government service and fixed term contracts.

3.2 In the case of a fixed term employee with a contract shorter than 6 months, the probation period will be adjusted accordingly.

3.3 The formal probationary period will not apply to existing Council employees where they have already completed a probationary period with the Council. However, the employee's performance will be monitored closely during the first 6 months of the new appointment and during this period the employee will be expected to demonstrate their suitability for the post. The manager and employee should have regular one-to-ones and where concerns about the employee's performance are identified, these should be addressed through the Council's Capability Policy & Procedure.

3.4 Probationary periods are set for a specific period of time, and appointments cannot be confirmed prior to the end of the agreed period. Probationary periods can however be terminated earlier, where it is clearly identified during the process that the employee is not suitable and meeting the standards of the role a formal assessment meeting will take place (refer to Section 10).

4. Roles and Responsibilities

4.1 The roles and responsibilities of those involved in the probationary process areas follows:

New Employees should:

- Demonstrate commitment to developing the skills and experience needed for the job and attend any training required.
- Comply with all Council policies and procedures.
- Seek support as required from their line manager, colleagues and where appropriate mentor.
- Attend the induction programme as soon as possible after joining – People Team will arrange this.
- Attend any probationary/one to one meeting when invited.

Line Managers should:

- Ensure the new employee is aware of the Probation Policy and how, when and why their progress will be monitored.
- Provide advice, support and supervision.
- Ensure that the relevant training and guidance is provided.
- Set the new employee objectives soon after joining.
- Identify any areas of concern and discuss and agree with the employee how these will be addressed.
- Meet regularly with the employee to review progress and ensure probation paperwork is completed.

If the line manager has any concerns regarding the employee's performance during the probation period, they should discuss with a member from the People Team at the earliest opportunity.

5. Probation Procedure

5.1 The employee will be informed by their manager about the key responsibilities of their role and that their performance and suitability will be measured by way of regular probationary review meetings. Informal one-to-one meetings should also be arranged on a regular basis during the probation period to ensure the employee is on track and kept informed of their progress.

Typical Timetable for Formal Review Meetings

Initial Meeting	By then end of week 4
1 st Formal Review Meeting	Week 8
2 nd Formal Review Meeting	Week 12
Final Assessment Meeting	During final month of probation period (weeks 20 – 24)

6. Initial Meeting

6.1 The line manager should meet with the new employee within the first few weeks to discuss the following:

- Clarify responsibilities and establish any priorities.
- Explain induction process including the completion of mandatory training and attendance of induction sessions.
- Identify any initial training required to allow the employee to carry out their duties.
- Explain the process that will be followed during the probationary period, including regular review meetings.
- Set relevant objectives which should be specific, measurable, realistic, and timely.
- **Complete Probationary Performance Plan Form.**

7. 1st Formal Review Meeting

7.1 The line manager will be responsible for arranging the 1st review meeting to discuss the employee's performance and suitability for the role. The manager should refer to the job description, person specification, and induction progress as part of the meeting.

Probationary review meetings might include discussion around:

- How the employee is settling into the role.
- Any additional support or training required by the employee.

- How does the manager feel the employee is performing in their duties.
- Ensuring attendance and timekeeping are acceptable.
- How the employee is interacting with the team and colleagues – addressing any behavioural issues.
- Review objectives set in the initial meeting.
- Is the nature of the role as expected by the employee.

7.2 The meeting should be a two-way discussion with the manager providing feedback and highlighting any concerns with the employee. The meeting is also an opportunity for the employee to provide feedback and raise any concerns regarding support, training, or anything else they feel relevant.

7.3 The Probationary Review Form (Appendix 2) must be completed by the manager and returned to the People Team. Any actions agreed must be documented in the form.

7.4 If the employees' performance is satisfactory, the manager will confirm this as part of the 1st review meeting.

7.5 If the employee's performance is unsatisfactory, the manager will discuss issues of concern during the 1st review meeting. The employee will have an opportunity to respond to the matters being raised, and the required improvements will be agreed and any support including training identified. The manager will document the agreed actions in the Probation Review Form and share with the employee (Appendix 2).

7.6 Whilst every opportunity will be given for the employee to improve, they should be informed of the possible outcomes if the required standards are not met which includes employment not being confirmed.

8. 2nd Formal Review Meeting

8.1 The 2nd review meeting will follow the same process as the 1st review meeting – refer to Section 7.1 and 7.2.

8.2 The updated Probationary Review Form (Appendix 2) must be completed by the manager and returned to the People Team. Any actions agreed must be documented on the form.

8.3 If the employee's performance is satisfactory, the manager will confirm this as part of the 2nd review meeting.

8.4 Where it was identified at the 1st review meeting that the employee's performance is not satisfactory and at the 2nd review meeting the required improvements have not been made, the employee must be made aware of this. The employee must be given the opportunity to respond to the matters raised, and agreed actions will be documented in the probationary review form (Appendix 2).

8.5 Whilst every opportunity will be given for the employee to improve, they should be informed of the possible outcomes if the required standards are not met which includes employment not being confirmed.

9. Final Assessment Meeting

9.1 The final review meeting will follow the same format as the previous meetings (Section 7 & 8). When the employees' performance is on track and the likely outcome of the meeting will be to confirm the appointment, the meeting will go ahead on a one-one basis with the employee and line manager. The manager must email the People Team confirming the probation has been completed and the appointment confirmed. The People Team will then email the employee to confirm their appointment.

9.2 Where an employee's performance is not on track and there are concerns regarding the appointment not being confirmed, a formal review meeting will be held, refer to Section 10.

10. Formal Probationary Review Meeting

10.1 Where a new employee has not performed to the required standard during their probationary period (or during any extended probationary period), despite support having been given to improve their performance, it may be necessary to terminate their employment on the grounds of their suitability and ability to do the job. This could occur at the end of the original probationary period or at the end of the extended probationary period.

10.2 A meeting will be arranged with the employee, their line manager, the Head of Service and a member of the People Team. The employee will be advised in writing that a formal meeting is taking place to review their probationary period, and they will be advised of their right to be accompanied at this meeting by a colleague or trade union representative.

10.3 The Head of Service will act as the Hearing Officer at this meeting, and the line manager will be required to explain the issue and outline what action has been taken in order to support the employee and help them improve through the probationary period. They should

also outline any extenuating or mitigating circumstances that the employee may have raised at the review meetings.

10.4 The employee will be invited to give their views about the situation before the Hearing Officer makes a decision about the future employment of the employee. An adjournment is likely to be called while the Hearing Officer considers the issues and makes a decision.

10.5 Following the meeting, the decision of the Hearing Officer will be confirmed in writing. If the decision is to end employment, the employee will be given the right to appeal within 5 working days of the decision. Any appeal should be addressed to the Corporate Manager - People who will arrange for an independent manager to review the matter – the decision of this appeal panel will be final.

11. Extension of Probation Period

11.1 In exceptional circumstances where a manager feels that an employee has not fully met all the expectations or requirements of the post, they may find it necessary to extend the probationary period and seek advice from the People Team. If the employee does not meet the required standards during the extended probation period, a formal probation meeting will be held – refer to the Section 10.

11.2 Extensions to probationary periods may be appropriate where an employee has experienced difficulties in meeting the requirements of the role, either because they have not had enough exposure to certain aspects of the role or where they have not performed satisfactorily. A high level of absence may also mean that an employee has not had the opportunity to achieve all that is expected from their role. Any concerns should have been discussed with the employee during their previous and review meetings to allow them reasonable opportunities to improve.

11.3 The purpose of extending a probationary period is to allow further time for the employee to make the necessary improvements in performing in their role to the required standard.

11.4 The employee should be supported in making those improvements and given a specific time scale within which to do so.

11.5 Should a probation period be extended the People Team will arrange for a letter to be sent advising the employee that their probation has been extended and on what grounds.

Impact assessment (IA) record

[Please refer to the [Governance navigator](#) for further information on IAs]

Data Privacy IA required?	(Yes /No)
Equalities IA required?	(Yes/ No)
Climate Change IA required?	(Yes/ No)

Document control information	
Title	Probation Policy
Topic/Service	People Team
Version	1.0
Next review date	Annually April
Last reviewed by	People Team
Last reviewed date	N/A
Approving authority	Cabinet
Approval date	

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 Rushmoor Borough Council

Appendix 1

Probationary Performance Plan

(the Performance Plan should form part of the discussions during the formal review meetings)

Name:	Job Title:
Department:	Start Date:

Performance Objective/Responsibilities	Target/Measures	Required Outcome

Comments

Employees Signature		Date
Managers Signature		Date

Appendix 2

Probationary Review Form - First/Second Assessment

Name:	Job Title:
Department:	Start Date:

Job Performance:

Conduct:

Training & Development:

Number of days absent:

Timekeeping (please circle as appropriate): **Good / Unsatisfactory**

Managers Overall Assessment

Exceeds Expectations:

Meets Requirements:

Requires training/coaching:

Concerns identified:

Action Plan:

Employee Comments:

**Employees
Signature**

Date

**Managers
Signature**

Date

Equality Impact Assessment: Screening Tool

The **Equality Impact Assessment (EIA) Screening Tool** should be completed for any new proposal, plan or project. It helps staff check if their proposal will positively, neutrally, or negatively affect residents, staff, or service users. If the impact is positive or neutral, a full EIA isn't needed.

A **full EIA** is required if the screening shows a negative impact on specific groups. We also advise that a full EIA should be completed when a [key decision](#) is being made. Key decisions are executive actions likely to:

- Significantly affect Council tax, budget balances, or contingencies.
- Have a major impact on communities across two or more Borough wards.
- Expenditure or savings over £100,000 qualify as significant, with a £250,000 threshold for property transactions.

Furthermore, for staff, we generally consider the impact on more than 25 people as significant, which would require a full EIA. If you're unsure, you can seek guidance from the Policy Team.

***After screening, if you identify the need for a full Equality Impact Assessment, you can use your existing answers as a foundation for the full assessment.**

Name of Project	Probation Policy
Reference number (if applicable)	
Service Area	People Team
Date screening completed	17 th June 2026
Screening author name	Jennifer Villamayor
Policy Team sign off	Martin Iyawe (1 st July 2026)
Authorising Director/Head of Service name	

1. Please provide a summary of the proposal

The aim of the Probation Policy is to ensure that managers have clear procedures to follow and that they understand their responsibilities in the process.

The benefits of the Probation Policy are providing managers and new employees with a clear and transparent process in the first few months of employment relating to a probation period. The major changes to the policy are key formal reviews during the probation period and forms to complete.

The policy impacts new staff and managers who will be managing the probation process.

2. Who will the proposal impact? Please indicate Yes or No

Group of people	Impacted?
Residents	No
Businesses	No
Visitors to Rushmoor	No
Voluntary or community groups	No
Council staff	Yes
Trade unions	Yes
Other public sector Organisations	N/A
Others	Please specify: N/A

3. What impact will this change have on staff? Please complete where relevant:

The policy impacts new staff and managers who will be managing the probation process. The probation policy applies to all new staff across the Council (all service areas).

Difficult to say exactly how many staff will be impacted as it will depend on volume of recruitment each year.

The main impact of the policy will be on managers with responsibilities to ensure the probation policy is followed and forms completed/returned to the People Team. New staff will also have a responsibility to actively partake in the probation process.

4. What consultation or engagement will you be leading (with residents, staff, or other stakeholders) as part of this project?

The wider People Team have been consulted along with SLT. Feedback received was considered and the policy updated. The People Team are waiting for feedback and comments from UNISON regarding the Probation Policy.

5. What impact will this change have on people with protected characteristics and/or from disadvantaged groups?

Direct and indirect impacts

When completing this table, please consider both **direct and indirect impacts**, see helpful guidance.

Direct discrimination occurs when someone is treated less favourably than another person because of a **protected characteristic**. This includes:

- **Actual possession** of a protected characteristic.
- **Perceived possession** of a protected characteristic (discrimination by perception).
- **Association** with someone who has a protected characteristic (discrimination by association).

A valid comparison must show that someone without the protected characteristic would have been treated better in similar circumstances. It can still be direct discrimination even if the person treating you unfairly shares the same characteristic.

Note: Age discrimination may be lawful if it can be objectively justified. For other protected characteristics, direct discrimination is unlawful regardless of intent or justification.

Indirect discrimination happens when a **policy, rule, or practice** applies to everyone but puts people with a protected characteristic at a **particular disadvantage**. It occurs when:

- A policy is applied equally to all.
- It disadvantages a group sharing a protected characteristic.
- You are personally disadvantaged by it.
- The organisation cannot justify the policy as a proportionate means of achieving a legitimate aim.

If the policy can be objectively justified, it is not considered indirect discrimination.

For example: Closing public toilets may be an example of indirect discrimination, as it affects everyone but disproportionately disadvantages women, due to toilet frequency, alternative options and safety/hygiene factors.

Likely impact

For the groups identified earlier, tick the likely impact (both direct and indirect) on people with protected characteristics (e.g., age, disability, race, etc.):

- **Neutral:** No impact.
- **Positive:** Benefits people with protected characteristics.
- **Negative:** Harms people with protected characteristics.

- **Not Sure:** It's unclear how this affects people with protected characteristics, or more information is needed.

Rate the negative impact as **low**, **medium**, or **high**. Also, consider whether the proposal may be seen as controversial or negative by some groups. See the guidance for help.

Protected characteristic - Age

(for example, young people under 25, older people over 65)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
	Yes	N/A		Younger or less experienced employees may be more likely to struggle during probation due to limited workplace experience.

Protected characteristic – Disability

(include people with physical disabilities, people with learning disabilities, blind and partially sighted people, Deaf or hard of hearing people, neurodiverse people. This also includes carers.)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
	Yes	N/A		The policy allows extension of probation periods where absence has affected performance. This may disproportionately affect disabled employees if absence is related to their condition, unless reasonable adjustments are applied.

Protected characteristic - Gender reassignment and identity

(Include people who identify across the trans* umbrella, not only those who have undergone gender reassignment surgery. This is inclusive of girls and or/women, men and/or boys, non-binary and genderfluid people and people who are transitioning) *Trans is an umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth.

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

Protected characteristic - Marriage and Civil Partnership

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

Protected characteristic – Pregnancy and Maternity

(Include people who are pregnant in or returning to the workplace after pregnancy. Could also include working parents.)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
	Yes	N/A		Employees who are pregnant or on maternity-related absence may have reduced opportunity to demonstrate performance within standard probation timescales.

Protected characteristic – Race or ethnicity

(include on the basis of colour, nationality, citizenship, ethnic or national origins)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
	Yes	N/A		Assessment of conduct, behaviour and team integration may be subject to unconscious bias if not applied consistently.

Protected characteristic – Religion or belief

(include no faith)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

Protected characteristic - Sex

(Under the Equality Act 2010 and following the 2025 Supreme Court ruling on 15 April 2025, a person's legal sex is defined as their biological sex as recorded at birth. Trans individuals are still protected from discrimination under the characteristic of gender reassignment.)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

Protected characteristic - Sexual Orientation

(Include people from across the LGBTQ+ umbrella, for example, people who identify as lesbian, gay, bisexual, pansexual or asexual.)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

Protected characteristic - Other

(e.g. people on low incomes, people living in poverty, looked after children, people with care experience, people who are homeless, people with mental health problems, people who are prison leavers, people affected by menopause, people affected by menstruation and/or period poverty)

Positive impact	Neutral impact	Negative impact	Not Sure	Description of the impact (if applicable) <i>Consider both direct and indirect impacts when completing this table</i>
Yes		N/A		The probation policy provides a clear and transparent process for all new staff and is based solely on capability and not protected characteristics.

6. Screening Decision

Outcome	Yes or No
Neutral or Positive – no full EIA needed*.	Yes
Negative – Low Impact – full EIA at the service director's discretion*.	No
Negative – Medium or High Impact – must complete a full EIA.	No
Is a full EIA required? Service decision:	No
Is a full EIA required? [Policy Team] sign off recommendation:	No
Flag for DPIA (will include engagement that collects personal data). [Policy Team]:	No

Flag for ethics (high risk / will involve engagement with vulnerable residents):	No
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Once you've completed the screening tool and determined that the proposal is likely to have a positive or neutral impact on people with protected characteristics, the following can be included in the 'Equality Impact Assessment' part of the report. ***'An equality impact check found that this proposal would have a positive or neutral impact on people with protected characteristics. Therefore, a full assessment is not required.'***

Please send this completed EIA Screening Tool to Policy@rushmoor.gov.uk for quality checking by the policy team.

If required, please continue to the full assessment below.