

Section 13 - Probationary/Settling in Period

4 minutes read

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Requirements

13.1 A probationary/settling in period must be in place for all appointments to roles that fall within the scope of this guidance¹

13.2 During this period, regular meetings must be scheduled and prioritised between the responsible person and the individual and safeguarding (process, understanding and behaviours) must form a core part of these meetings.

13.3 Any safeguarding concerns must be thoroughly discussed and documented and appropriate next steps taken, including discussion with the Diocesan Safeguarding Advisor where necessary

13.4 For **employees**, their contract and/or employee handbook must detail the grounds on which the probation period can be extended or terminated, which must include failure to complete Safeguarding training, or failure to comply with the Safeguarding policy

13.5 The probationary/settling in period must include an element of direct observation of the individual by an appropriate member of the relevant team, in order to provide reassurance that he/she is demonstrating safe behaviour, maintaining appropriate boundaries, can spot causes of concern and knows when to report and who to.

¹This would not apply to clergy office holder roles or PTO where there is no probationary period.

Good practice advice

Why?

For **employees**, the probation period is a key part of the recruitment and selection process, and is, in many senses, the only real test as to whether someone is suitable for the role. This is becoming increasingly relevant as references become shorter and are often simply a factual confirmation of someone's service and job title, and as mentioned above, interviews and induction are carried out virtually.

For **volunteers**, some sort of 'probation' period is equally as important and might be better referred to as a 'settling in' or 'trial' period.

How?

The period should be long enough for the responsible person to provide the necessary support and guidance to enable individuals to reach the required standard by the end of that period, as well as make a proper assessment of the individual's conduct and ability, including his/her attitude and approach to safeguarding.

Generally, the period set will be a minimum of three months up to six months. It is common practice for **employees** to have a six month probation period. Where appropriate, and mainly in the case of **employees**, relevant objectives may be set as part of this process and, if so, a written record of these and accompanying discussions should be kept.

During this period, there should be regular meetings between the responsible person and the individual. As described in [Section 14: Ongoing Support, Accountability, Oversight & Supervision](#), these meetings might look different for volunteers compared to employees, but whatever format they might take, the meetings should allow the responsible person time to assess the individual, supporting them if this is a new area as well as noticing any warning signs should they arise. Warning signs to be mindful of include:

- unwillingness to attend safeguarding training or lack of engagement – noting there are many reasons why this may be the case
- not understanding appropriate boundaries, e.g. individuals allowing children to sit on their knee
- demonstrating potentially unsafe behaviour, e.g. individuals allowing themselves to be on their own with a child
- Failing to recognise or act upon a safeguarding matter.

The emphasis during this period should primarily be on supporting the employee or volunteer, but should there be any safeguarding concerns, these should be discussed fully and openly and the resolution recorded on the individual's personnel file.

All safeguarding training must be completed during the probation/settling-in period. If this is not feasible, as a minimum the Basic and Foundation (where the latter is required) must be completed. See also [Section 15: Learning and Development](#).

For **employees**, bodies should ensure that they have a probationary policy that provides a process for dealing with those who are unsuccessful

in their probationary period. The policy should make clear the grounds on which the probation period can be extended or terminated, which will include failure to undergo safeguarding training, or failure to comply with the safeguarding policy.

The probation review should be scheduled in advance to ensure it occurs before the last day of the probation period. If the review does not happen before the end of the probationary period, the employee may be deemed to have successfully passed his/her probationary period by default. A successfully completed probation period should be confirmed in writing.

For **volunteers**, there is no employment contract and therefore they do not have the same rights as employees. If the settling-in period reveals that the volunteer is not suited to a particular role, or there are any emerging safeguarding concerns, the volunteer can be asked to leave and stand down at any point.

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