



Barrowby Church of England Primary School

Personal Relationships at Work Policy

1. Definition

1.1 Definition of close personal relationship:

- Employees or applicants who are married, dating, in a civil partnership or co-habiting arrangement;
- Immediate family members of the applicant or employee e.g. parents and step-parents, son and daughter, brother and sister, grandparent and grandchild;
- Other relations of the applicant or employee e.g. extended family such as aunts, uncles, cousins, nieces, nephews and any other individuals with whom there is a close personal relationship;

1.2 The School recognises that relationships as defined above may exist or develop within the organisation. Whilst not all such situations raise any issues there may be occasions where a perceived or actual conflict of interest exists between an employee's job or the County Council and public's interests and the employee's personal interests.

2. Objectives

2.1 The policy aims to assist Head Teachers and employees in dealing sensitively, but effectively, with situations where employees have, or form, a relationship as defined, with a work colleague.

3. Minimum Standards

3.1 The provisions of this policy are intended to avoid any possible conflict of interest, perception or accusation of bias, favouritism or prejudice. They are also intended to ensure that all employees feel confident of fair treatment without the fear that a close personal relationship will influence their or other employees' treatment or broader working relationships.

4. The Procedure

4.1 Participation in recruitment, promotions, grievance and discipline

All applicants are required to disclose on the application form if they are related to any County Councillors (and Governors of the School) or Senior Officers. Applicants are asked to state the name of the person and the relationship. Failure to disclose such a relationship may disqualify the applicant or may result in action being taken in accordance with the Disciplinary Procedure. 14

To avoid any accusation of bias an employee must not be involved in any appointment process where they are related, or have a close personal relationship outside of work with the individual being considered for appointment. Employees involved in appointments should ensure that those appointments are made only based on merit.

Employees must not be involved in any decisions relating to discipline, grievance, promotion or pay adjustments for any employee where there is a close personal relationship as defined within this policy.

4.2 Where there is a relationship between an applicant and a manager

Where new appointments are being considered, and there is a personal relationship between an applicant and an existing employee, where one of them would be the immediate line manager or senior reporting manager of that team, the implications of this should be considered and discussed as part of the selection process. This is to ensure that, assuming they are otherwise the most suitable candidate for the job, the appointment would also be appropriate taking into account operational issues and standards.

The type of issues that should be explored includes:

- potential conflict of interest and confidentiality issues, including the impact on the perceptions and employee relations within the team;
- considering making alternative supervision/line management arrangements for the applicant where there are potential conflicts of interest;
- If the work of the post involves financial transactions there should be an appropriate separation of duties and probity and other financial safeguards should be followed;
- Impact on the School Community or the public, including issues relating to trust and confidence and the public image of the School.

It is important, however, to ensure that any approach or actions are not unfair or discriminatory, i.e. avoid any assumption at the outset that the working arrangement will be unsatisfactory without exploring the issues. Nevertheless, it is important to explore the issues that may arise to ensure these can be managed effectively.

4.3 Where there is a relationship between an applicant and team colleagues

Where an individual is appointed, transferred or promoted and will work in the same team or establishment with an employee with whom they have a relationship as defined in this document, but not in a line management relationship, the implications of this should be considered and discussed as part of the selection process.

4.4 Authority to appoint

Where, following consideration of all the factors, the employee responsible for the appointment considers that a candidate could be appointed, despite a declared relevant relationship as defined, they must clear the appointment with their Head Teacher.

Where one party to the relationship is the Head Teacher, the necessary authority for appointment should be authorised by the Chair of Governors who may seek advice from the relevant Human Resource provider.

Where the relationship in question concerns the Chair of Governors, the appointment should be cleared by the FRP Committee who may seek advice from the relevant Human Resource provider.

To avoid questions arising later, the appointing employee is required to make a written record of the fact that the decision to appoint, despite a declared relationship, was

made with appropriate authority. This record should be kept with the candidate's original application form on his/her personal file; the candidate should be made aware of this and they should be advised of why it is necessary.

4.5 Relationships formed whilst in post

Relationships as defined may form between colleagues in the same team or the course of their employment. Such situations should be managed with care and sensitivity in the interests of all concerned. It is important, however to ensure that any approach or actions are not unfair or discriminatory.

4.6 Requirement to disclose a close personal relationship

Where a relationship as defined, is formed between members of the same team whilst in post, this should be disclosed, in confidence, to the Head Teacher where appropriate, by the employees concerned. This disclosure should be recorded on the employee's personal file.

It is acknowledged that work related friendships are quite naturally formed in the School. Any employee is therefore expected to exercise judgement as to whether or not the relationship has developed to such an extent that it can be described as a close personal relationship, which could potentially raise the issue that this policy seeks to address. Failure to disclose a personal relationship could leave an employee open to allegations of misconduct should subsequent issues arise.

4.7 Where a relationship develops between a member of the Senior Management Team and a team member

Where a close personal relationship involves the Head Teacher, Deputy Head Teacher or senior reporting manager and an employee, the appropriate senior manager within the team, in consultation with a Human Resources provider, should, in discussion with both employees: Make alternative supervision/line management arrangements of the team member for issues involving a potential conflict of interest. These include matters related to pay, promotion, job opportunity, discipline and grievance issues; consider if it is appropriate to communicate any agreed adjustments etc. to other colleagues in the team/School to manage any concerns;

- more specific operational issues e.g. in relation to finance and procurement roles and responsibilities which are governed by Financial Regulations, Procedures, or Procurement Rules;
- Assess any impact on the School community, including issues relating to trust and confidence and the public image of the School.

Expectations should be clearly defined and managed as appropriate.

4.8 Relationships between team members

Where a relationship as defined, is between two team members (with no line management or supervisory relationship) the member of the Senior Management Team should explore the relevant issues with the individuals concerned, including:

- any general operational issues such as working patterns and arrangements;
- more specific operational issues including finance and procurement roles and responsibilities which are governed by Financial Regulations, Procedures, or Procurement Rules;
- any potential conflict of interest and confidentiality issues;

- any impact on the School community, including issues relating to trust and confidence and the public image of the School;
- Consider if it is appropriate to communicate such agreed adjustments etc. to other colleagues in the team/School to manage any concerns.

Expectations should be clearly defined and managed as appropriate.

4.9 Inter team relationships

Where a relationship as defined, is between two team members from separate teams whose functions are interdependent, for example an administrative team that supports teachers, a member of the Senior Management Team should explore the relevant issues with the individuals concerned, including:

- any general operational issues such as working patterns or arrangements;
- more specific operational issues including finance and procurement roles and responsibilities which are governed by Financial Regulations, Procedures, or Procurement Rules;
- any potential conflict of interest and confidentiality issues;
- any impact on the School community, including issues relating to trust and confidence and the public image of the School;
- Consider if it is appropriate to communicate such agreed adjustments etc. to other colleagues in the team/School to manage any concerns.

Expectations should be clearly defined and managed as appropriate.

4.10 When issues cannot be managed effectively

Where any issues identified cannot be managed effectively or the individuals within the relationship feel uncomfortable remaining within the same team or school, there will be the need to explore, in discussion with both employees whether a move to another team or school might be the most appropriate way forward.

When discussing such an issue there should be no assumptions made, on gender, status/grade etc. as to who might be the most appropriate employee to move. Care should be taken to avoid discrimination and ensure that the views of the individuals involved are taken into account, balancing this with the needs of the service and the issues that present themselves.

A Human Resources provider can assist with this process where required and reference should be made to the Redeployment Scheme for School Based Staff.

4.11 When relationships break down

There may be occasions when a relationship as defined, breaks down and the individuals concerned remain in the same team or School with a potential impact on relationships and service delivery. In such cases, use of the Council's Employee Support and Counselling Service may be useful to the individuals concerned as an initial approach. If it is envisaged that the breakdown of the relationship is or will cause ongoing workplace issues, these should be addressed sensitively in discussion with the employees with a view to the issues being resolved, where possible.

The Schools Human Resources provider can assist with this process where required and reference should be made to the Redeployment Scheme for School Based Staff.

This may, ultimately, in some cases need to involve exploring with the parties the scope for transfer of one or both of them.

4.12 Use of confidential and private information

Employees may acquire information that has not been made public and is still confidential. It is a betrayal of trust to breach such confidences. Employees should never use or disclose such confidential information to anyone that they are in a personal relationship with for personal gain. The information should also not be to the disadvantage or the discredit of the School or anyone else. Equally, employees should always observe the provisions of the Data Protection Act 1998.

4.13 Conduct or performance issues

As with any employee, significant conduct or performance issues may need to be dealt with, where appropriate, under the School's Disciplinary or Capability procedures. Much would depend on the nature and degree of the issue concerned or whether alternative approaches as outlined in this policy would be more appropriate or effective.

5. Transfer of employees

Should it be necessary, in the interests of the service, to consider the transfer of an employee every effort should be made to ensure that they are moved to comparable alternative employment in line with the Redeployment Scheme for School Based Staff.

6. Other colleagues affected by a close personal relationship

Employees who feel they are affected by a close personal relationship at work involving other colleagues, should at all times feel that they can approach without prejudice, their Head Teacher and/or Chair of Governors to explain their concerns.

7. Provision of references

When providing references, the individual providing the reference should make clear if it is provided as a personal or colleague reference or provided formally as a reference on behalf of the School. If a reference is not being provided by a member of the Senior Management Team of the School i.e. formally on behalf of the School, then the reference should not be produced on School headed stationery.

8. Relationships with contractors or potential contractors

No special favour should be shown in the tendering process to businesses run by, for example, friends, partners or relatives. Employees who engage or supervise contractors or have any other work relationship with contractors and have previously had, or currently have a close personal relationship with someone who works for contractors, must declare the relationship to their Head Teacher.

9. Further Information

For further information and guidance, managers should contact their Human Resources provider.

10. Personal Relationships at Work Policy Review

This policy is reviewed by the Head teacher, staff and Governors in accordance with Barrowby School's Policy and Review Cycle for approval by the Full Governing Body, every 3 years.

Last reviewed: November 2023

Next review: November 2026