Personal Relationships at Work Policy

Purpose

The purpose of this policy is to provide employees and managers with clear guidance on the standards of behaviour expected of all employees in their dealing with staff, service users and the professional boundaries that must be respected in those relationships. This policy applies to all staff employed by The Consortium Trust and should be read in conjunction with

Disciplinary Policy & Procedure;	Data Protection Policy;
Mobility Clause;	Employer Terms and Conditions
Pay Policy;	Declaration of Pecuniary Interest;

1. Introduction

It is recognised that close personal relationships can and do sometimes form in the workplace. Situations may therefore arise where related persons or individuals with a close personal relationship are employed in the same school/setting in Consortium Trust. Whilst recognising the right of employees to privacy and family life, Consortium Trust has a legitimate right to protect the interests of the organisation, employees and service users and to take appropriate action when close personal relationships either have the potential to, or do, impact upon Consortium Trust' educational provision.

2. Aim

There are a number of key reasons for developing guidance with respect to individuals who have, or develop close personal relationships working together. Whilst problems arising from close personal relationships are relatively rare, the key reasons for this policy are as follows:

- To assist managers in dealing sensitively, but effectively, with situations where employees have, or form a close personal relationship with someone they work with. This will help avoid any possible conflict of interest or accusation of bias, favouritism or prejudice.
- 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.
- To ensure that employees are not involved in any appointment where they are a relative or partner of, or have a close personal relationship with, the individual being considered for appointment.
- To ensure that employees are not involved in decisions relating to discipline, promotion or pay adjustments and signing expenses for any other employee where there is a close personal relationship.
- To protect individuals against potential claims of favouritism, where one may have a supervisory or managerial responsibility for the other.
- To prevent the development of situations in which other members of staff feel unable to speak openly and honestly in the presences of one partner in the relationship.
- To avoid the potential for individuals to claim unfair treatment in terms of employment practice.
- To avoid the potential for the collusive abuse of patients or staff.
- To avoid any potential deterioration in individuals' job performance resulting from a relationship break down.
- To avoid any adverse impact on staff or patients resulting from a potentially divisive situation.

3. Objective and Responsibilities

Line Managers and staff to be aware of this policy and its implications, adhere to its principles in carrying out their duties.

All employees

- Must adhere to this policy and declare any close personal relationships with any work colleagues to their line managers.

All Managers will:

- Address all relevant discussions sensitively and confidentially
- Consistently and professionally apply this Policy, taking advice as appropriate
- Maintain confidential records of all controls imposed, so that this can be referred to in case of any future conflict.

4. Definition of Close Personal Relationships

- Employees who are married, in a civil partnership, in a cohabiting arrangement or in an intimate relationship.
- Immediate family members e.g., parents, son/daughter, sibling, grandparent/grandchild or who act as such e.g., step parent.
- Extended family such as aunts, uncles, cousins, nieces, nephews and in-laws.
- Platonic personal relationships.

5. Principles

Although the existence of a close personal relationship between members of staff does not constitute a bar to the employment or promotion of either party, staff must declare to their line manager or equivalent any relationship which may give rise to a conflict of interest, or breach of confidentiality. Staff who have close personal relationships must not work in a direct reporting relationship or in the same chain without making a disclosure to an appropriate Line Manager. Where such a relationship exists or develops between members of staff who are in a line management or supervisory relationship with one another at work, they must not be involved in recruitment, selection, appraisal, promotion, or other management activity or process involving the other party. Alternative management arrangements will be put in place for the more junior member of staff.

Where close personal relationships exist or develop, staff must not work in the same School/Setting without making a disclosure to the appropriate manager. It may not be necessary to alter working arrangements if there is no risk of a health and safety issue, conflict/breach of confidentiality or unfair advantage. However, a risk assessment should be carried out. Staff who are involved in close personal relationships with work colleagues do need to be aware, at all times, of their behaviour towards each other, particularly in the work environment.

6. Recruitment and Appointment of Employees

Where an applicant, if appointed, would work in the same School/Setting with an employee with whom they have a close personal relationship, the implications of this must be considered and discussed during 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 must be explored will include:

- General operational issues relating to working patterns, annual leave requirements etc. The applicant would need to be clear as to the operational requirements of the job which may involve different working times to their partner and no guarantee that leave could always be authorised to coincide.
- More specific operational issues, e.g. in relation to finance and procurement roles and responsibilities within a job which are governed by Financial Regulations.
- Potential conflict of interest and confidentiality issues including the impact on employee relations within the team.

7. Staff already in employment

Staff who are uncertain about whether they should take action regarding a close personal relationship between colleagues should seek guidance in confidence from the Head of Service People.

7.1 Relationships between a line manager and team member

Where a close personal relationship involves the direct line manager or senior reporting manager and a team member, the appropriate Academy Head or Line Manager within the team , in consultation with the Head of Service People, will 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 relating to pay, promotion, job opportunity and discipline issues. This will normally mean a change to this aspect of the line management arrangement whereby the team member is supervised by another Line Manager but management of work related functions remains unaltered.
- Undertake a risk assessment to consider any other operational issues that might occur and how these might be managed and, assess any impact on service user and the general public, including issues relating to trust and confidence and the public image of Consortium Trust;
- Consider if it is appropriate to communicate such agreed adjustments etc. to other colleagues in the team/workplace.

7.2 Relationships between team members

Where there is a known close personal relationship between two team members (with no line management or supervisor relationship) the line manager should explore the relevant issues with the individuals concerned, including:

- Any general operational issues relating to working patterns, annual leave requirements etc., which may affect cover arrangements.
- Any potential conflict of interest and confidentiality issues including the impact on the perceptions and employee relations within the team.
- Any impact on service users or the general public, including issues relating to trust and confidence and the public image of Consortium Trust.

8. Managing Identified Risks

Having been informed of any close personal relationship the line manager will work with the individuals concerned to identify any potential risks to themselves or conflicts of interest within the team, by means of a risk assessment. Wherever possible an agreement will be reached with the manager to make alternative management arrangements and confirm them in writing with the individuals concerned. Options that may be considered are as follows:

- No action necessary
- To discuss duties to take account of service needs and individual circumstances ensure working together is kept to a minimum
- To make alternative arrangements for line management in specified circumstances.

Where relationships have been disclosed the following will apply:

- Agreement will be sought between the individuals and the manager about the reason for any move or change necessitated as a consequence of a close personal relationship.
- Information disclosed must remain confidential and will not be disclosed to other parties without the express permission of those involved where possible.
- In cases involving relationships with patients, advice must be sought from the manager or Head of Service People. No changes will be undertaken unless detailed discussions have taken place with individuals affected.

9. Safeguarding concerns

Where a safeguarding concern is raised relating to a close personal relationship, the line manager should seek advice and support from the DSL or CEO. Dependent on the concern it may be necessary to investigate further and consider a transfer of one or both of the employees.

10. When issues cannot be managed effectively

Where any issues identified cannot be managed effectively there will be the need to explore, in discussion with both employees alternative arrangements. When considering a move to a different School/Setting or location there should be no assumptions made on gender, status/grade etc. as to who might be the appropriate employee to move. Care must 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.

11. When a relationship breaks down

There may be occasions when a close personal relationship breaks down and the individuals concerned remain in the same School/Setting or location with a potential impact on team relationships and educational provision. If it is envisaged that the breakdown of the relationship is causing, or will cause, ongoing workplace issues, these must be addressed sensitively in discussion with the employees with a view to the issues being resolved, where possible. The Head of Service People will provide advice where required. This may, ultimately, in some cases, involve exploring with both parties the scope for transfer of one or both of them. Staff will also be offered the support of Occupational Health.

12. Transfer of Employees

Should it be necessary to consider the transfer of an employee, every effort must be made to ensure that they are moved to comparable, alternative employment in consultation with the employee(s) and the Head of Service People. Where alternative employment is not available at a comparable grade, the Head of Service People will be able to advise, based on the individual circumstances of the case, whether or not it would be reasonable to apply pay protection.

Document Control

Changes History

Version	Date	Amended By	Details of Change
V1	2/5/2023	Liz Frere-Smith, HoS People	New Policy

Approval

Name	Job Title	Signed	Date
Andrew Aalders-Dunthorne	CEO	Electronic signature	25.05.2023
Dawn Carman-Jones	On behalf of the Trust Board	Electronic signature	25.05.2023

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