



# Staff Handbook

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## Policy Details

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|------------------------------------|------------------------------------|
| Person Responsible for this Policy | <b>Angela Ransby</b>               |
| Policy Author                      | <b>Angela Ransby</b>               |
| Date to Trust Board                | <b>September 2025</b>              |
| Date Ratified                      | <b>1<sup>st</sup> October 2025</b> |
| Review Date                        | <b>September 2026</b>              |
| Policy displayed on website        | <b>YES</b>                         |
| CEO Signature                      | <b>Angela Ransby</b>               |
| Trust Board Signature              | <b>Alan Whittaker</b>              |

| Updates Made   | Date                           |
|--|--------------------------------|
| Schedule 20 updated<br>Schedule 25 updated<br>Schedule 3 updated   | September 2024                 |
| Schedule 5, section 5.1 updated.   | November 2024                  |
| Schedule 20 updated with new policy  | January 2025                   |
| Schedule 15 updated with section 8.  | February 2025                  |
| Schedule 15, point 3 updated<br>Schedule 2, point 2 updated  | May 2025                       |
| Schedule 13, new template<br>Schedule 15, updated<br>Schedule 25, updated<br>Schedule 2, point 3.4 updated<br>Schedule 12, updated<br>Schedule 19, Trust vehicles updated<br>P 22 table of paid and unpaid leave updated | September 2025                 |
| Schedule 5, section 8.5 updated<br>Schedule 15, section 7 updated  | December 2025<br>February 2026 |

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This handbook is to be read in conjunction with the following Raedwald Trust policies which can be found on the policies section of the Raedwald Trust website.

- Safeguarding & Child Protection Policy, including the Online Safety Procedure appendix
- Managing Allegations of Abuse Against Adults Policy
- Whistleblowing Policy
- RT Code of Conduct
- Equality, Diversity & Inclusions Policy
- Health & Safety Policy and Manual
- Anti Fraud & Corruption and Gifts & Hospitality appendices of the Finance Policy
- Disciplinary Policy
- Capability Policy
- Grievance Policy
- Maternity, Paternity, Adoption, Parental & Shared Parental Procedure
- Data Protection Policy
- Pay Policy
- Lone Working Policy
- Mental Health Procedure

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## The Staff Handbook

### 1. Introduction

- 1.1 The Raedwald Trust is established to deliver its core purpose devolved by parliament: the advancement of education in the public interest. Committed to the 7 Principles of Public Life (Selflessness, Integrity, Objectivity, Accountability, Openness, Honesty, and Leadership), the Raedwald Trust uses compliance to drive a culture of ethics and probity. Through this approach, the Raedwald Trust is able to unleash greatness by enabling bold, imaginative and innovative leadership.
- 1.2 We are an equal opportunities employer and do not discriminate on the grounds of gender, sexual orientation, marital or civil partner status, pregnancy or maternity, gender reassignment, race, colour, nationality, ethnic or national origin, religion or belief, disability or age.

### 2. Using the Staff Handbook

- 2.1 This Staff Handbook sets out the main policies and procedures that you will need to be aware of while working for us. You should familiarise yourself with it and comply with it at all times. Any questions you may have with regard to its contents or what you have to do to comply with it should be referred to your line manager.
- 2.2 The policies and procedures set out in this handbook apply to all staff unless otherwise indicated. They do **not** form part of the terms of your contract with us, which are provided to you separately.

### 3. Responsibility for the Staff Handbook

- 3.1 The Trust has overall responsibility for this Staff Handbook and for ensuring that its policies and procedures comply with our legal obligations.
- 3.2 The Staff Handbook is reviewed annually to ensure that its provisions continue to meet our legal obligations and reflect best practice.
- 3.3 Everyone should ensure that they take the time to read and understand the content of this handbook and act in accordance with its aims and objectives. Managers must ensure all staff understand the standards of behaviour expected of them and to take action when behaviour falls below those requirements.

### 4. Personal details, home address and next of kin

- 4.1 Whenever we process personal data about you in connection with our policies, we will process it in accordance with our Data Protection Policy. We will only process your personal data if we have a lawful basis for doing so. We will notify you of the purpose or purposes for which we use it. Please see the Privacy Notice on the Raedwald Trust website for further information.

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## **Schedule 1 Dress code**

### **1. About this policy**

We encourage everyone to maintain an appropriate standard of dress and personal appearance at work. The purpose of our dress code is to establish basic guidelines on appropriate clothing and appearance at our workplace, so that we:

- a. promote a positive and professional image;
- b. respect the needs of staff from all cultures and religions;
- c. make any adjustments that may be needed because of disability;
- d. take account of health and safety requirements; and
- e. help staff and managers decide what clothing it is appropriate to wear to work.

Managers are responsible for ensuring that this dress code is observed and that a common-sense approach is taken to any issues that may arise. Any enquiries regarding the operation of our dress code (including whether an article of clothing is suitable to wear to work) should be made to your line manager.

Failure to comply with the dress code may result in action under our Disciplinary Procedure.

We will review our dress code periodically to ensure that it reflects appropriate standards and continues to meet our needs.

This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Appearance**

While working for us you represent us with pupils, parents and other members of the public. Your appearance contributes to our reputation and the development of the Trust.

It is important that you appear clean and smart at all times when at work, particularly when you may be in contact with pupils, parents and other business contacts or the general public.

Different departments may have specific clothing requirements, for example, because their work is customer-facing or raises particular health and safety concerns. It is important that you dress in a manner appropriate to your working environment and the type of work you do.

Employees in customer facing roles or if otherwise requested should wear smart business attire.

Employees in certain roles may be asked to cover up visible tattoos or to remove or cover up visible body piercings.

You should not wear ripped jeans, shorts, combat trousers/shorts, slogan t-shirts, vests, joggers (unless for sporting activities), crop tops, see through material, casual, gym or beach wear or clothing that exposes areas of the body normally covered at work. Clothing should not be dirty, frayed or torn. Tops should not carry wording or pictures that might be offensive or cause damage to our reputation.

For colleagues across the Trust engaged in pupil facing work, flat and enclosed footwear must be worn and take account of health and safety requirements.

Where we provide safety clothing and equipment, including protective footwear, it should be worn or used as appropriate and directed.

You should not wear clothing or jewellery that could present a health and safety risk.

You will be supplied with an identity badge that must be worn and visible at all times when you are at work or representing the Trust at other schools.

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### **3. Religious and cultural dress**

You may wear appropriate religious and cultural dress (including clerical collars, head scarves, skullcaps and turbans) unless it creates a health and safety risk to you or any other person or otherwise breaches this policy.

Priority is at all times given to health and safety requirements.

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## Schedule 2 Expenses policy

### 1. About this policy

- 1.1 This policy deals with claims for reimbursement of expenses, including travel, accommodation and hospitality.
- 1.2 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### 2. Reimbursement of expenses

- 2.1 We will reimburse expenses properly incurred in accordance with this policy. Any attempt to claim expenses fraudulently or otherwise in breach of this policy may result in disciplinary action. Staff must not use their own shop loyalty / reward cards when purchasing goods for the trust.
- 2.2 Expenses will only be reimbursed if they are:
- (a) submitted to the Headteacher/Trust Business Manager and CEO on the appropriate claim form;
  - (b) submitted within one month of being incurred;
  - (a) supported by relevant documents which must be clear and legible (for example, VAT receipts, tickets, and credit or debit card slips); and
  - (c) authorised in advance where required.
- 2.3 Claims for authorised expenses submitted in accordance with this policy will be paid directly into your bank/building society account via payroll.
- 2.4 Any questions about the reimbursement of expenses should be put to your line manager before you incur the relevant costs.

### 3. Travel expenses

- 3.1 We will reimburse the reasonable cost of necessary travel in connection with our business. The most economic means of travel should be chosen if practicable and you should use existing travelcards or season tickets wherever possible. The following are not treated as travel in connection with our business:
- (a) travel between your home and usual place of work;
  - (b) travel which is mainly for your own purposes; and
  - (c) travel which, while undertaken on our behalf, is similar or equivalent to travel between your home and your usual place of work.
- 3.2 **Trains.** We will reimburse the cost of standard class travel on submission of a receipt with an expenses claim form.
- 3.3 **Taxis.** We do not expect you to take a taxi when there is public transport available, unless it is cost effective due to a significant saving of journey time or the number of staff travelling together. A receipt should be obtained for submission with an expenses claim form.
- 3.4 **Car.** Where it is cost effective for you to use your car for business travel, and you have been authorised to do so, you can claim a mileage allowance on proof of mileage. Details of the current mileage rates can be obtained from Headteacher/Trust Business Manager and CEO. You can also claim for any necessary parking costs which must be supported by a receipt or the display ticket. You must ensure that the claimed mileage were necessarily incurred on official duties and that your car insurance policy covers business journeys undertaken on behalf of the Trust. Mileage claims must be made monthly for that month.
- 3.5 **Air travel.** If you are required to travel by plane in the course of your duties you should discuss travel arrangements with your line manager in advance.
- 3.6 We will not reimburse penalty fares or fines for parking or driving offences, other than at our discretion in exceptional circumstances.

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4.2 **Hospitality**

- 4.3 The Trust will provide staff with tea, coffee, decaffeinated coffee, decaffeinated tea, milk and other alternatives to milk (for staff with medical conditions) whilst they are at work. If staff wish to have any other drinks e.g. herbal tea, filtered coffee etc, these must be purchased directly by the individuals. Should staff with other allergies require another alternative, please contact the CFO.

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### **Schedule 3 Anti-harassment and bullying policy**

#### **1. Introduction**

- 1.1 The Raedwald Trust is committed to a work environment free of harassment and bullying, where everyone is treated with dignity and respect. The Trust takes a firm stance against bullying between pupils, and it is important that all staff lead by example with their own behaviour.
- 1.2 Harassment and bullying can have very serious consequences for individuals and the Trust including loss of morale, poor work performance, increased turnover of staff, legal claims and damage to our reputation.
- 1.3 We will take allegations of harassment or bullying seriously and address them promptly and confidentially where possible. Harassment or bullying by an employee will be treated as misconduct under our Disciplinary Procedure. In some cases, it may amount to gross misconduct leading to summary dismissal.
- 1.4 This policy does not form part of any employee's contract of employment and may be amended at any time.

#### **2. Scope and purpose of this policy**

- 2.1 The policy sets out the types of behaviour that are unacceptable and covers bullying and harassment both in and out of the workplace such as on school trips, at school events or work-related social functions. This policy covers bullying and harassment by staff and also by third parties such as suppliers or visitors to the school.
- 2.2 This policy applies to all employees of the Trust, Trustees, contractors, casual and agency staff and volunteers (collectively referred to as staff in this policy). The policy does not apply to pupils or parents who consider they have been the subject of bullying or harassment by Raedwald Trust employees, where separate complaints procedures apply.
- 2.3 Employees may make a complaint under this policy or the grievance policy but not both policies.

#### **3. The legal framework**

- 3.1 The Equality Act 2010 prohibits harassment related to age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (protected characteristics). The Protection from Harassment Act 1997 also makes it unlawful to pursue a course of conduct which you know or ought to know would be harassment, which includes causing someone alarm or distress. Further, the Worker Protection (Amendment of Equality Act 2010) Act 2023 places a legal and increased responsibility on organisations to take 'reasonable steps' to prevent sexual harassment in the workplace. Under the Health and Safety at Work Act 1974 staff are entitled to a safe place and system of work.
- 3.2 Individual members of staff may in some cases be personally legally liable for harassment of colleagues or third parties (including pupils), and may be ordered to pay compensation by a court or employment tribunal.

#### **4. What is harassment?**

- 4.1 Harassment is any unwanted physical, verbal or non-verbal conduct which has the purpose or effect of:
  - (a) violating a person's dignity; or
  - (b) creating an intimidating, hostile, degrading, humiliating or offensive environment for them.
- 4.2 It also includes treating someone less favourably because they have submitted or refused to submit to such behaviour in the past. Unlawful harassment may involve conduct related to a protected characteristic (see 3.1) or of a sexual nature (sexual harassment). Harassment is unacceptable even if it does not fall within any of these categories.
- 4.3 A person may be harassed even if they were not the intended "target". For example, a person may be harassed by racist jokes about a different ethnic group if they create an offensive environment for him/her. Harassment may also occur even if an individual does not have a protected characteristic, but another individual engages in unwanted conduct towards them because:
  - (a) they perceive the recipient to have a protected characteristic; or
  - (b) they are associated with a person who does have a protected characteristic.
- 4.4 A single incident can amount to harassment although first-time conduct which unintentionally causes offence will not usually be harassment. However, it will become harassment if the conduct continues after the recipient has made it clear, by words or conduct, that such behaviour is unacceptable to him/her.

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## 5. What is bullying?

- 5.1 Bullying is offensive, intimidating, malicious or insulting behaviour involving the misuse of power that can make a person feel vulnerable, upset, humiliated, undermined or threatened. Power does not always mean being in a position of authority but can include both personal strength and the power to coerce through fear or intimidation.
- 5.2 Legitimate, reasonable and constructive criticism of a worker's performance or behaviour or reasonable instructions given to workers in the course of their employment, will not amount to bullying on their own. It is also recognised that differences of opinion, outbursts of bad temper etc. may occur from time to time in any normal working environment. We would normally expect our employees to resolve through informal processes rather than through the use of the formal procedure set out below.

## 6. Examples of bullying and harassment

- 6.1 Bullying and harassment can take the form of physical, verbal and non-verbal conduct. Employees should always consider whether their words or conduct could be offensive. Conduct may be harassment or bullying whether or not the person behaving in that way intends to offend. Examples of unacceptable conduct include (not an exhaustive list):
- (a) unwanted physical conduct or 'horseplay' including touching, pinching, brushing past someone, invading their personal space, and more serious forms of physical or sexual assault;
  - (b) unwelcome sexual advances or suggestive behaviour or suggestions that sexual favours may further a career or that a refusal may hinder it;
  - (c) continued suggestions for social activity after it has been made clear that such suggestions are unwelcome;
  - (d) sending or displaying material that is pornographic or that some people may find offensive (including e-mails, text messages, video clips and images sent by mobile phone or posted on the internet);
  - (e) offensive or intimidating comments or gestures, or insensitive jokes or pranks;
  - (f) jokes or comments about an individual's age, disability, sexual orientation or religion, or derogatory or stereotypical remarks about a particular ethnic or religious group or gender;
  - (g) ignoring or shunning someone, for example, by deliberately excluding them from a conversation, a workplace social activity or from meetings;
  - (h) shouting at, being sarcastic towards, ridiculing or demeaning others;
  - (i) physical or psychological threats;
  - (j) overbearing and intimidating levels of supervision;
  - (k) inappropriate and/or derogatory remarks about someone's performance;
  - (l) abuse of authority, power or status by those in positions of seniority.

## 7. Informal steps

- 7.1 If you think you are being bullied or harassed, you should initially consider raising the problem informally with the person responsible. You should explain clearly to them that their behaviour is not welcome or makes you uncomfortable. If this is too difficult or embarrassing, you should speak to your line manager (or another manager if the matter relates to your line manager), who can provide advice and assistance in resolving the issue formally or informally.
- 7.2 If you are not certain whether an incident or series of incidents amount to bullying or harassment, you should initially contact your line manager (or another manager if the matter relates to your line manager) informally for confidential advice.
- If informal steps have not been successful or are not possible or appropriate, you should follow the formal procedure set out below.

## 8. Raising a formal complaint

- 8.1 If you wish to make a formal complaint about bullying or harassment, you should submit it in writing to your Head Teacher whose role is to achieve a solution wherever possible and to respect the confidentiality of all concerned. If the matter concerns that person, you should refer it to the CEO.
- 8.2 Where the Head Teacher feels bullied or harassed they should raise the matter with the CEO, or if it involves the CEO, with the Chair of the Trust Board.

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- 8.3 Your written complaint should set out full details of the conduct in question, including the name of the harasser or bully, the nature of the harassment or bullying, the date(s) and time(s) at which it occurred, the names of any witnesses and any action that has been taken so far to attempt to stop it from occurring.
- 8.4 As a general principle, the decision whether to progress a complaint is up to you. However, we have a duty to protect all staff and may pursue the matter independently if, in all the circumstances, we consider it appropriate to do so.

## **9. Formal investigations**

- 9.1 We will investigate complaints in a timely and confidential manner. Individuals not involved in the complaint or the investigation should not be told about it. Wherever possible the investigation will be conducted by someone with no prior involvement in the complaint. The investigation should be thorough, impartial, objective and carried out with sensitivity and due respect for the rights of all parties concerned.
- 9.2 We will arrange a meeting with you, usually within five working days of receiving your complaint, so that you can give your account of events. You have the right to be accompanied by a colleague or a trade union representative of your choice, who must respect the confidentiality of the investigation. You will be given an indication of the timescales for the investigation. The investigator will arrange further meetings with you as appropriate throughout the investigation.
- 9.3 Where your complaint is about an employee, we may consider suspending them on full pay or making other temporary changes to working arrangements pending the outcome of the investigation, if circumstances require and there is no alternative to suspension. The investigator will also meet with the alleged harasser or bully who may also be accompanied by a colleague or trade union representative of their choice to hear their account of events. They have a right to be told the details of the allegations against them, so that they can respond.
- 9.4 Where your complaint is about someone other than an employee, such as a contractor, pupil, parent or visitor, we will consider what action may be appropriate to protect you and anyone involved pending the outcome of the investigation, bearing in mind the reasonable needs of the Trust and the rights of that person. Where appropriate, we will attempt to discuss the matter with the third party.
- 9.5 We will also seriously consider any request that you make for changes to your own working arrangements during the investigation. For example, you may ask for changes to your duties or working hours so as to avoid or minimise contact with the alleged harasser or bully.
- 9.6 It may be necessary to interview witnesses to any of the incidents mentioned in your complaint. If so, the importance of confidentiality will be emphasised to them.
- 9.7 At the end of the investigation, the investigator will submit a report to the CEO nominated to consider the complaint. A copy of the report and findings will be given to you and to the alleged harasser or bully, together with recommendations for further action.
- 9.8 The CEO will arrange a meeting with you, usually within one week of receiving the report, in order to discuss the outcome and what action, if any should be taken. You have the right to bring a colleague or a trade union representative to the meeting.

## **10. Action following the investigation**

- 10.1 If the CEO considers that harassment or bullying has occurred, prompt action will be taken to address it.
- 10.2 Where the harasser or bully is an employee, the matter will be dealt with as a case of possible misconduct or gross misconduct under our Disciplinary Procedure.
- 10.3 Where the harasser or bully is a third party, appropriate action might include putting up signs setting out acceptable and unacceptable behaviour; speaking or writing to the person and/or their superior about their behaviour; or, in very serious cases, banning them from the premises or terminating a contract with them.
- 10.4 Whether or not your complaint is upheld, we will consider how best to manage the ongoing working relationship between you and the alleged harasser or bully. It may be appropriate to arrange some form of mediation and/or counselling or to change the duties, working location or reporting lines of one or both parties.
- 10.5 Any staff member who deliberately provides false information or otherwise acts in bad faith as part of an investigation may be subject to action under our Disciplinary Procedure.

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## **11. Appeals**

- 11.1 If you are not satisfied with the outcome you may appeal in writing to the CEO, stating your full grounds of appeal, within five working days of the date on which the decision was sent or given to you.
- 11.2 We will hold an appeal meeting, normally within five working days of receiving your written appeal. This will be dealt with impartially by a Trustee who has not previously been involved in the case (although they may ask anyone previously involved to be present). You may bring a colleague or trade union representative to the meeting.
- 11.3 We will confirm our final decision in writing, usually within five working days of the appeal hearing. This is the end of the procedure and there is no further right of appeal.

## **12. Protection and support for those involved**

- 12.1 An employee who makes a complaint or who participates in good faith in any investigation conducted under this policy must not suffer any form of retaliation or victimisation as a result. Anyone found to have retaliated against or victimised someone in this way may be subject to a disciplinary process.
- 12.2 Victimisation is subjecting a person to a detriment because he/she has in good faith:
  - (a) complained (whether formally or otherwise) that someone has been bullying or harassing him/her or someone else; or
  - (b) supported someone to make a complaint; or
  - (c) given evidence in relation to a complaint.
- 12.3 This would include isolating someone or giving them a heavier or more difficult workload. If you believe you have suffered any such treatment you should inform your line manager. If the matter is not remedied, you should raise it formally using our Grievance Procedure or this procedure if appropriate.
- 12.4 Making a complaint or giving evidence that you know to be untrue may lead to disciplinary action being taken against you.
- 12.5 Anyone found to have retaliated against or victimised someone for making a complaint or assisting in good faith with an investigation under this procedure will be subject to disciplinary action.
- 12.6 If a complaint is made against you, do not dismiss the complaint out of hand because you were only joking or think the complainant is being too sensitive. Remember that different people find different things acceptable and everyone has the right to decide what behaviour is acceptable to them and to have their feelings respected by others. You may have offended someone without intending to. If that is the case, the person concerned may be content with an explanation and an apology from you and an assurance that you will be careful in future not to behave in a way that you now know may cause offence. Provided that you do not repeat the behaviour that has caused offence that may well be the end of the matter.
- 12.7 We offer access to confidential counselling, which is available on request for anyone affected by, or accused of, bullying or harassment. The details are;  
Education Support – tel: 0800 856 148 email: [educationsupport.org.uk](mailto:educationsupport.org.uk)

## **13. Training**

- 13.1 All new starters must complete equality, diversity and inclusion training as part of their induction programme.

## **14. Confidentiality and data protection**

- 14.1 Confidentiality is an important part of the procedures provided under this policy. Everyone involved in the operation of the policy, whether making a complaint or involved in any investigation, is responsible for observing the high level of confidentiality that is required. Details of the investigation and the names of the person making the complaint and the person accused must only be disclosed on a "need to know" basis.
- 14.2 As part of the application of this policy, the Trust may collect, process and store personal data in accordance with our data protection policy. We will comply with the requirements of Data Protection Legislation (being the UK General Data Protection Regulation and the Data Protection Act 2018) and any implementing laws, regulations and secondary legislation, as amended or updated from time to time. Records will be kept on the employee's personal file in accordance with our Retention Schedule and in line with the requirements of Data Protection Legislation. This will include information about a complaint along with a record of the outcome and of any notes or other documents compiled during the process.
- 14.3 Breach of confidentiality may give rise to disciplinary action under our Disciplinary Procedure.

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**15. Review of this policy**

This policy is reviewed and amended annually. We will monitor the application and outcomes of this policy to ensure it is working effectively.

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## **Schedule 4 Holidays policy**

### **1. About this policy**

- 1.1 This policy sets out our arrangements for staff wishing to take holidays (also known as annual leave).
- 1.2 This policy covers all staff at all levels and grades, including full-time, part-time, permanent and fixed-term employees, managers, directors, and trainees.
- 1.3 This policy does not form part of any employee's contract of employment and we may amend it at any time. We may also vary the policy as appropriate in any case.

### **2. Your holiday entitlement**

- 2.1 The Trust's holiday year runs in line with the academic year. If your employment starts or finishes part way through the holiday/academic year, your holiday entitlement during that year shall be calculated on a pro-rata basis rounded up to the nearest half day.
- 2.2 Holiday entitlement for support staff will increase after five years service.
- 2.3 Except as set out in this policy, holiday entitlement must be taken during the holiday/academic year in which it accrues. Any holiday not taken by the end of the holiday/academic year will be lost and you will not receive any payment in lieu.
- 2.4 Unused holiday can **only** be carried over to another holiday year:
  - (a) in cases involving sickness absence, as set out in paragraph 5.;
  - (b) in cases of maternity, paternity, adoption, parental or shared parental leave, as set out in paragraph 6.;
  - (c) in any other case where your line manager has given permission in writing;
  - (d) if otherwise required by law.

### **3. Taking holiday**

- 3.1 We may require you to take (or not to take) holiday on particular dates, including when the schools are closed, particularly busy, or during your notice period.
- 3.2 Support staff on a 52-week contract are required to seek approval for all annual leave requests. They should make any such requests to the Headteacher/CEO.

### **4. Sickness during periods of holiday**

- 4.1 If you are sick or injured during a holiday period and would have been incapable of work, you may choose to treat the period of incapacity as sick leave and reclaim the affected days of holiday.
- 4.2 Employees already on sick leave before a pre-arranged period of holiday may choose to cancel any days of holiday that coincide with the period of incapacity and treat them as sick leave.
- 4.3 Trust sick pay will only be paid for such days if you comply with our Sickness Absence Policy, including notifying your manager immediately of your incapacity and obtaining medical evidence, even if you are abroad.
- 4.4 Dishonest claims or other abuse of this policy will be treated as misconduct under our disciplinary procedure.

### **5. Long-term sickness absence and holiday entitlement**

- 5.1 Holiday entitlement continues to accrue during periods of sick leave.
- 5.2 If you are on a period of sick leave which spans two years, or if you return to work after sick leave so close to the end of the holiday year that you cannot reasonably take your remaining holiday, you may carry over unused holiday to the following leave year.

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5.3 Any holiday that is carried over under this rule but is not taken within 18 months of the end of the holiday year in which it accrued will be lost.

5.4 Alternatively, you can choose to take your paid holiday during your sick leave, in which case you will be paid at your normal rate.

**6. Family leave and holiday entitlement**

6.1 Holiday entitlement continues to accrue during periods of maternity, paternity, adoption, parental or shared parental leave (referred to collectively in this policy as family leave).

6.2 If you are planning a period of family leave that is likely to last beyond the end of the holiday year/academic year, you should discuss your holiday plans with your manager in good time before starting your family leave. Any holiday entitlement for the year that is not taken before starting your family leave can be carried over to the next holiday/academic year.

6.3 For the avoidance of doubt this covers your full holiday entitlement.

6.4 Any holiday carried over should be taken immediately before returning to work or within three months of returning to work after the family leave.

**7. Arrangements on termination**

7.1 On termination of employment you may be required to use any remaining holiday entitlement during your notice period. Alternatively, you will be paid in TOIL of any accrued but untaken holiday entitlement for the current holiday year to date, plus any holiday permitted to be carried over from previous years under this policy or as required by law.

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## **Schedule 5    Sickness absence policy**

### **1.    About this policy**

- 1.1    This policy sets out our arrangements for sick pay and for reporting and managing sickness absence.
- 1.2    Abuse of sickness absence, including failing to report absence or falsely claiming sick pay will be treated as misconduct under our Disciplinary Procedure.
- 1.3    This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2.    Reporting when you are sick**

- 2.1    If you cannot attend work because you are sick or injured you should telephone your manager as early as possible and no later than 30 minutes after the time when you are normally expected to start work.
- 4.4    In the event that a staff member is absent, an email divert and an 'out of office' may be applied to their emails for the duration of the absence. In all cases, the CEO will confirm who is the temporary recipient of diverted emails.

### **3.    Evidence of incapacity**

- 3.1    You must complete a self-certification form for sickness absence of up to seven calendar days.
- 3.2    For absence of more than a week you must obtain a certificate from your doctor stating that you are not fit for work, giving the reason. You must also complete a self-certification form to cover the first seven days. If absence continues beyond the expiry of a certificate, a further certificate must be provided.
- 3.3    If your doctor provides a certificate stating that you "may be fit for work" you must inform your manager immediately. We will hold a discussion with you about how to facilitate your return to work, taking account of your doctor's advice. If appropriate measures cannot be taken, you will remain on sick leave and we will set a date for review.

### **4.    Statutory sick pay**

- 4.1    You may be entitled to Statutory Sick Pay (SSP) if you satisfy the relevant statutory requirements. Qualifying days for SSP are set out in your employment contract. The rate of SSP is set by the government in April each year. No SSP is payable for the first three consecutive days of absence. It starts on the fourth day of absence and may be payable for up to 28 weeks.

### **5.    Trust sick pay**

- 5.1    Any entitlement to Trust sick pay is set out in your contract of employment. CEO discretion can be applied. In cases where this discretion is applied, the CEO and Chair of Trustees will confirm arrangements.

### **6.    Fit for Work service (FFW)**

- 6.1    FFW is a government-funded occupational health assessment service. The service is intended to assist employees return to work, using a return-to-work plan where appropriate. If you want to know more about FFW please speak to your line manager.
- 6.2    Once you have been absent for ten days (or on three occasions within a month), either we or your doctor may suggest referring you to FFW. Your doctor may do this before you have been absent for four weeks if they think it would be beneficial for you.
- 6.3    If your doctor refers you to FFW please let your line manager know, unless you would prefer not to tell us. If your case manager at FFW wishes to speak to us, please ask them to contact your line manager.

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6.4 Once a FFW (Occupational Health) appointment is made for you through a referral by the Trust, any cancellations of must be made via the Trust's HR Officer with 48 hours notice. Failure to attend or to provide notice may result in the staff member occurring a cancellation charge.

## 7. Return-to-work interviews

7.1 After a period of sick leave your manager may hold a return-to-work interview with you. The purposes may include:

- (a) ensuring you are fit for work and agreeing any actions necessary to facilitate your return;
- (b) confirming you have submitted the necessary certificates;
- (c) updating you on anything that may have happened during your absence;
- (d) raising any other concerns regarding your absence record or your return to work.

## 8. Managing Frequent, regular and high levels of absence

8.1. Where an individual's absence level meets one of the following trigger points, the senior manager should review the absence levels with the employee at their return to work interview.

- Three or more incidences of absence in any three month period; or
- Six or more incidences of absence in a twelve month period; or
- Ten or more day's sickness absence within a twelve month period.

Please note that in circumstances where employees are part time or where employees work different shift patterns triggers will be pro rata to reflect the employees working pattern; or

- Any other pattern of absence which causes concern e.g. absences occurring on a particular day of the week, absences occurring before and after planned leave, a continuous pattern of absence review meetings, or
- Where an employee has a mixture of short and long term absences, it will be appropriate to manage the employee's absence in accordance with the above procedure.

8.2. In cases where employees have met the trigger point, there may be circumstances where discretion may be used by the Trust, as to whether or not an absence improvement plan is necessary. Although each case will be reviewed individually, the following are examples of circumstances where discretion may be appropriate:

- Emergency health situations which exceed 10 days i.e. hospitalisation
- Where a planned surgical operation takes place and appropriate period of rehabilitation is required.
- Where a period of long term absence has been managed under this policy

8.3 During this meeting, it is important that;

- Concern is expressed about the employee's level of absence
- Discussions at previous meetings are recapped i.e. what the health issue is, what actions have been agreed, what support has already been offered and what the current situation is.
- Any supportive measures are identified which may assist the employee in achieving a satisfactory level of attendance. This may include consideration of reasonable adjustments such as changes to the workload, work practices or work pattern.
- Any adjustments that may be appropriate in accordance with the Equality Act 2010 are identified.
- Discussions are held with the employee as to whether there is anything that they can do to improve their health
- If a referral to Occupational Health has not already been made, it should be considered at this point.

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· Clear targets for action/improvement are agreed and a review date of six months from the date of the meeting is set. The targets that should be set are absence levels of no more than 5 working days (pro rata for part time employees) or 3 separate incidences of absence

· Clarifies what further action will be taken if the absence targets are not met

8.4 The discussions and actions should be recorded in a letter and stored in the employees file on School Pod. The senior manager should meet with the employee at 2 month intervals during the six month review period to review progress against the absence targets. If at any point during the six month review period the absence targets have been exceeded, the individual should be invited to a formal health capability meeting.

8.5 Where a satisfactory level of attendance has been achieved, no further absence discussions will be required. However, where employees have met the agreed target set, employees are reminded that their attendance will still be monitored in line with the sickness absence policy and that a further formal absence meeting will be reinstated where attendance is not sustained as per the policy.

## **9. Managing Long Term Absence**

We are committed to helping employees return to work from long-term sickness absence. As part of our sickness absence meetings procedure (see section 13), we will, where appropriate and possible, support returns to work by:

- Obtaining medical advice;
- Making reasonable adjustments to the workplace, working practices and working hours, including a time-limited phased return to work.

A phased return to work will often be a recommendation of an occupational health advisor or the employees GP. Employees will receive their full pay on the phased return. Phased returns to work should be for a maximum of 4 weeks, this may be extended at the discretion of the CEO in exceptional circumstances subject to HR advice for each instance. In the event an employee requests that the phased return is extended beyond 4 weeks, a dialogue should be held with the employee in regards to a temporary contractual change being made to their working hours to accommodate the request and their pay adjusted accordingly.

If a staff member is absent before a school closure then the staff member will continue to be deemed to be absent unless they provide a fit note stating they are fit to return.

9.1 Absences in excess of 28 days (including non-working days) are considered to be 'long term' for the purposes of this policy and the Trust's primary focus is to ensure that those individuals are helped and supported back to work when they feel able to do so. Timescales and approaches outlined in this policy may be subject to change with reference to the circumstances of a particular case.

9.2 After 28 days' absence (or 2 weeks where the absence relates to stress/anxiety or a recurrence of a previous medical condition), the designated senior manager or Head Teacher will arrange for the employee to attend a medical assessment with the Trust's occupational health advisors.

9.3 At the point where medical advice has been received back, the employee will be invited to a meeting to discuss their period of ill health. Senior managers must ensure that three working days' notice is given to the employee and also the right to be accompanied by a trade union representative or work colleague of their choice. The meeting will also be attended by an HR representative to ensure a fair, consistent and sensitive approach is maintained.

9.4 At the meeting the following points should be discussed with the employee;

Progress made and prognosis for return. This could include agreeing a return to work programme and/or adjustments if the employee is likely to become fit to return to work in the near future.

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Support available that could help assist recovery and return to work.

The medical report received back from the school's occupational health team.

Establish a return to work plan if appropriate

Information about the impact of continued absence on pay.

What alternatives the employer may wish to explore, i.e. redeployment, ill-health retirement etc.;

Consideration as to whether there is any external assistance which may support an early return to work and/or the maintenance of acceptable levels of absence. This may include government agencies, charitable bodies and other industry and specialist organisations

9.5 Following this meeting and during the period of absence, regular contact should be maintained with the employee concerned. In addition, senior managers should meet with the employee on a monthly basis to discuss their progress. Senior managers must ensure that they make notes of the meetings and write to the employee to confirm the outcome of the meeting and log this letter in the staff members file and on School Pod.

9.6. In circumstances where a return to work has not been achieved within an indicated period of time, it will be appropriate to invite the employee to a health capability meeting to discuss their attendance. This meeting would also be appropriate at the stage where the employee has been absent from work for 3 months.

## **10. Health Capability Meeting**

10.1 At the point where an employee's absence triggers a Health Capability meeting, the senior manager should write to the employee giving them three working days' notice of the meeting and the opportunity to be accompanied by a trade union representative or work companion of their choice. A member of HR should also be present.

10.2 The employee must take all reasonable steps to attend the meeting. If for any reason the date is not suitable, they should advise the senior manager of an alternative time when they are available. This should be within 10 working days of the original date.

10.3 A written warning will be issued at this meeting. This warning will remain on the employee's personal file for a period of twelve months. During this time employee must sustain a satisfactory level of attendance in accordance with the trigger points 8.1

10.4 Where an employee exceeds these triggers within the twelve-month time frame, they should be invited to a Health Capability Hearing.

10.5 In cases of long term sickness absence, it will be appropriate to progress to a Health Capability Hearing where an employee has been absent from work for a substantial period or in circumstances where occupational health advice has been received which suggests that the employee is unable to return to work within an indicated period of time.

10.6 Information regarding the potential for redeployment on grounds of ill-health or retirement on the grounds of ill-health should be sought as early as possible, however this may still be considered at anytime during the process.

## **11. Health Capability Hearing**

11.1 Where employees have been unable to sustain a satisfactory level of attendance despite supportive interventions or has had a continued period of long term sickness absence, a Health Capability hearing should be convened. This meeting should be heard by either the Head Teacher, CEO or panel of governors/trustees depending on the nature of the case.

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11.2 At this meeting, a senior manager will be expected to provide and present a report on progress to date, supportive interventions, occupational health guidance and targets agreed.

11.3 Employees should be given three working days' notice of the meeting, and the right to be accompanied by a trade union representative or work companion of their choice. An HR representative should also be present to provide advice on HR Policy and Procedure. The employee must take all reasonable steps to attend the meeting, but if there is a reason why the date is not suitable, the employee should advise the Hearing Officer of this and the hearing will be arranged within 5 working days of the original date.

11.4 Prior to the hearing the employee will receive details of all of the information to be discussed (e.g. occupational health report, details of previous meetings, certificates and sickness figures) and an agenda for the hearing. The documentation should be sent to the employee at least 3 working days before the hearing.

11.5 There are six possible outcomes of the hearing,

No further action is taken where the manager hearing the case believes that a sufficient improvement to attendance / satisfactory performance has been achieved. The employee will be advised that if this is not sustained they will re-enter the process at Section 8.2

A recommendation is made for further occupational health advice and a further review period is set.

Consideration to medical redeployment may be given if this is a recommendation from Occupational Health.

Consideration of the case under a different procedure i.e. capability or disciplinary

Issue of a final written warning with a set period for improvement, advising that a failure to improve could lead to dismissal

Dismissal of employee by reason of health capability.

### Table of paid & unpaid leave

Raedwald Trust does not offer time off in lieu (TOIL) to employees. In extraordinary circumstances, employees may request an exceptional arrangement for TOIL from the CEO.

| Category/<br>Circumstances   | Definition  | Time Allowed   |
|--|---|--|
| <b>Discretionary<br/>Compassionate Leave<br/>(Close Family Member)</b>   | Compassionate leave is normally intended for circumstances where there is sudden or serious illness or death of an immediate close family member or life partner (including same sex partners) to support with the grief and bereavement and dealing with any arrangements e.g. husband, wife, partner, father, mother, son, daughter, brother, sister. The leave will reflect what is required in the circumstances and will not necessarily always be 10 days. In exceptional circumstances additional leave may be approved but this will be on an unpaid basis.   | <b>In each academic year up to 10 days paid depending on circumstances<br/>Included within the 10 days is 1 day to attend a funeral<br/>Up to a further 10 additional days paid at the discretion of the CEO<br/>Thereafter unpaid leave</b> |
| <b>Discretionary leave to attend the funeral of someone who:<br/>- is not a member of the immediate family or<br/>- is a close personal friend</b> | For example: grandfather, grandmother, grandson, grand-daughter, step-father, step-mother, step-son, step-daughter half-brother, half-sister, father/mother in law, son/daughter-in-law, aunt, uncle, cousin or a close friend.   | <b>Up to 1 day paid</b>  |
| <b>Discretionary leave to attend a doctor's, dentist or hospital appointment</b>   | Employees are normally expected to ensure that appointments for personal visits to the doctor, dentist, hospital etc. are outside of contracted working hours. However, if this is not reasonably practicable, time off from work will be permitted to attend such appointments. Employees should ensure that any time off causes as little disruption as possible, i.e. the appointment is at the beginning or the end of the day. The school reserves the right to see evidence of such appointments, such as a letter or appointment card. Where the appointment is not urgent, and where the time would negatively impact on the employee's area of work, or that of team colleagues, the appointment should be re-arranged to a more suitable time and date wherever possible.<br><br>Where the Headteacher considers an employee has taken an unreasonable amount of time off for this purpose, the school reserves the right to withdraw payment for such absence, at its discretion and following consultation with the employee. Consideration will be given to the Equality Act 2010 and any statutory right to time off, in all instances. The absence will be recorded as sickness and the necessary self-certification form completed in the normal way. | <b>Paid/unpaid depending on circumstances</b>  |
| <b>Leave for rehabilitation, assessment or treatment because of a disability</b>   | The Equality Act 2010 identifies the provision of paid time off as a reasonable adjustment. It acknowledges that a disabled person may need to  | <b>Paid</b>  |

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| <p><b>(discretionary although there is a statutory right to leave considered as a reasonable adjustment)</b></p>                                   | <p>be absent from work for “rehabilitation, assessment or treatment”. There is no evidence that disabled people are more likely to be absent from work than other staff. However, in monitoring absence, due allowance should be made for absences related to a disability.</p> <p>Absences relating to <b>appointments</b> for rehabilitation, assessment or treatment of a disability should be recorded as disability leave. This is paid, and does not affect sick pay entitlements. However, any other periods of absence related to a disability should be classified and recorded as sick leave.</p>   |  |
| <p><b>Disability related sickness absence (discretionary although there is a statutory right to consider leave as a reasonable adjustment)</b></p> | <p>Disability related sickness absence is sickness absence related to an individual’s disability. For example: an episode or relapse of a disability related condition or time off for recuperation following a period of disability leave for treatment. Also see above section.</p>   | <p><b>Paid in line with Sickness Entitlement</b></p>   |
| <p><b>Discretionary Emergency/Dependant’s Leave (statutory right to apply for such leave although granting of such leave is discretionary)</b></p> | <p>There is a statutory right to unpaid leave to deal with an emergency relating to a dependant (e.g. son/daughter, partner (including same sex partners), and parent). It is expected that this type of leave is taken where the employee has identified short term, rather than long term, caring responsibilities. See Schedule 6 for a wider list of dependant relationship.</p>  | <p><b>In each academic year up to 2 days paid, depending on circumstance at the discretion of the CEO. Thereafter unpaid leave</b></p>   |
| <p><b>Discretionary leave for Fertility Treatment.</b></p>   | <p>As with other medical appointments, the expectation is that fertility treatment occurs outside of contractual working hours where possible. Where it can be shown that there are good reasons why this is not possible, the following will apply.</p> <p>Absence relating to the investigation of a fertility issue will be regarded as sickness absence. In such circumstances, the member of staff will be subject to the school’s normal sickness absence provisions. Female members of staff personally undergoing treatment themselves should note that sickness absence associated with IVF will not be regarded as ‘pregnancy related’.</p> <p><b>Fertility Treatment</b></p> <p>Members of staff, who have completed 12 months’ service, may be granted leave for fertility treatment or the support of a partner undergoing the same.</p> <p><b>Female staff personally undergoing fertility treatment</b></p> <p>Wherever possible, appointments related to fertility treatment should be arranged outside of working hours. Where this is not possible, a member of staff</p> | <p><b>Paid in line with sickness entitlement</b></p> <p><b>Up to 5 days paid leave in any 12-month period</b></p> <p><b>Up to 1 day paid leave in any 12-month period.</b></p> |

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|   | <p>may be granted up to 5 working days paid leave in any 12 month period for the purpose of receiving and recovering from IVF treatment and to attend appointments specifically associated with the IVF process (i.e. pre-booked interventions for consultant appointments, collection and delivery of eggs, monitoring tests, etc.).</p> <p>Should the member of staff require time off because of the side effects of the treatment, it will be subject to the normal sickness absence entitlement. Sickness absence associated with IVF will not be regarded as 'pregnancy-related'.</p> <p>The paid leave can be taken to suit the member of staff's needs, subject to operational circumstances, e.g. in one block, separate days or half days. The leave entitlement will be pro-rated for part-time members of staff according to their normal weekly working hours.</p> <p><b>Members of staff supporting a partner undergoing fertility treatment</b></p> <p>If it is an essential requirement within the course of the treatment for the partner to attend a specific appointment, the school will allow eligible employees up to one day's paid leave in any 12-month period to support fertility treatment.</p> |   |
| <b>Discretionary leave to attend interviews</b>                                   | Such leave will be entirely at the discretion of the Headteacher. Any decision will take account of the role being applied for and the likely impact that the absence will have on the school.  | <b>Paid or unpaid at the discretion of the CEO</b>  |
| <b>Discretionary leave for moving house</b>                                       | Wherever possible staff are expected to ensure that any house move takes place out of school time. Where it is demonstrated that this is not possible, 1 day's unpaid leave may be granted.   | <b>1 day unpaid</b>   |
| <b>Discretionary leave to deal with urgent/unforeseen circumstances</b>           | Any urgent and unforeseen circumstances (e.g. house fire/burglary/flood) which require urgent attention by an employee and prevents an employee attending work. Reasonable time off will be allowed.  | <b>In each academic year up to 2 days paid, depending on circumstance at the discretion of the CEO. Thereafter unpaid leave</b> |
| <b>Discretionary leave to attend a child's graduation from University/College</b> | It is recognised that the employee will have no influence over the day when this will occur and that it will normally occur during term time.   | <b>1 day unpaid</b>   |
| <b>Discretionary leave to attend a close family wedding</b>                       | It is recognised that the employee may have no influence over the day when this will occur.   | <b>1 day unpaid</b>   |
| <b>Discretionary leave to take professional examinations or for study</b>         | It is assumed that the Headteacher will have approved the course of study and that the gaining of the specific qualification will be for the overall benefit of the school. If this is not the case it would not be reasonable for the Headteacher to allow time off during term time. <p>Where the course of study has been approved, the Headteacher will allow time off as appropriate to enable the employee to take examinations. Only in</p>  | <b>Up to 3 days paid leave in each academic year.</b>   |

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|  | exceptional circumstances would additional time off be allowed for study leave.   |  |
| <b>Sporting and similar activities</b>           | Selection for representative sporting and similar activities may be seen as an honour for the school and highly motivational for students. The Headteacher should therefore consider sympathetically requests for paid leave of absence to participate in such events (e.g. at county or national level). However, extended absences (e.g. tours abroad) would require special consideration in each case.  | <b>Paid</b>  |
| <b>Discretionary additional leave for carers</b> | <p>Although it is expected that employees will make arrangements that do not prevent them from carrying out their normal duties, in exceptional circumstances an employee may apply for leave in addition to paid annual leave, to deal with childcare and other caring responsibilities such as assisting a dependant during or after a stay in hospital, moving a dependant to residential or other form of care, helping a dependant through a medical procedure, etc. It is expected that this type of leave is taken where the employee has identified long-term, rather than short term, caring responsibilities. The granting of such leave is entirely at the discretion of the CEO after taking account of the impact such leave might have on the school.</p> <p>Employees have a statutory right to take one week of unpaid leave in any rolling 12-month period to provide or arrange care for a dependent with a long-term need. This applies from the commencement of employment with the Trust. A long-term need is defined as:</p> <ul style="list-style-type: none"> <li>• Illness or injury (physical or mental) that requires, or is likely to require, care for more than three months</li> <li>• A disability for the purposes of the Equality Act 2010</li> <li>• Requiring care for a reason connected with old age</li> </ul> <p>A dependant for the purposes of this policy is:</p> <ul style="list-style-type: none"> <li>• an employee's spouse, civil partner, parent or child;</li> <li>• a person who lives in the same household as the employee, but who is not their tenant, lodger, boarder or employee; or</li> <li>• anyone else who reasonably relies on the employee to provide assistance, make arrangements or take action of the kind referred to in paragraph 5.1.</li> </ul> <p>The minimum amount of Carer's Leave an employee can request in a 12-month rolling period is half a working day. The maximum period of leave that can be requested is one week. The days requested do not have to be consecutive.</p> | <p><b>In each academic year up to 2 days paid, depending on circumstance at the discretion of the CEO.</b></p> <p><b>Thereafter unpaid leave with up to one week in any rolling 12 month period.</b></p> |

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|   | <p>Employees must give either twice as many days' notice as the length of leave being requested, or 3 days' notice (whichever is the longer). The Trust will postpone your carer's leave if the running of the Trust will be unduly disrupted by your absence. However, you will be permitted to take the requested amount of leave within one month of your original request. If leave is postponed, this will be confirmed in writing within seven days of your request in a written counter notice. This will explain the reason for the postponement and the revised dates that Carer's Leave can be taken.</p>   |                                   |
| <b>Discretionary leave for blood donors</b> | <p>Although it is expected that staff will arrange to donate blood outside of working hours, if there is an opportunity to donate blood locally and it will mean only a short time away from school with minimal disruption, time off with pay will be allowed for this purpose.</p>  | <b>Paid</b>                       |
| <b>Gender transition</b>                    | <p>Time off for surgery and recuperation from surgery for gender reassignment will be recorded as sick leave. Other medical appointments relating to the process will be recorded as sick leave when it has not been possible to make them outside of working hours. There may also be a need for some non-medical appointments, for example for electrolysis or speech therapy. These will not qualify for sick leave. Headteachers should reasonably consider requests for unpaid leave or allow annual leave or flexi leave, where the system is in operation, when it has not been possible for these appointments to take place outside of work time.</p> <p>Any reasonable absence because of the effects of treatment for gender reassignment should not be considered for the purposes of action for unsatisfactory attendance.</p> | <b>Paid sick leave or unpaid.</b> |
| <b>Occupational health appointments</b>     | <p>Whilst employees are absent due to sickness, there is an expectation that they will make themselves available to attend any Occupational Health appointments regardless of when the appointment occurs. After returning to work, if any further appointments are made during the normal working pattern, paid time off will be granted to attend.</p>  | <b>Paid leave</b>                 |
| <b>Religious observances</b>                | <p>Headteachers should try to accommodate requests for time away from work for religious observance. This includes religious festivals, time away from work during prayer and adjusting working times to accommodate periods of fasting. The Headteacher and the employee should work together to ensure that there is minimum disruption to the school and that leave (which would be unpaid) is avoided wherever possible.</p>  | <b>Unpaid</b>                     |

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| <b>Strike Action</b>   | It is an individual's choice as to whether to join strike action, but a normal day's pay will be deducted for each day the strike action continues and the employee remains off work.  | <b>Unpaid</b>                                     |
| <b>Discretionary leave during adverse weather conditions</b>   | Employees have an obligation to present themselves for work each day at and between the times specified in their contracts of employment. During periods of severe inclement weather, if it is shown that the employee has made every effort to attend work but simply could not do so then the absence may be treated as paid leave. If, however, roads/public transport are available for use with only minimal disruption, and the employee still chooses not to attend work, the absence will be treated as unpaid.  | <b>Paid or unpaid, depending on circumstances</b> |
| <b>Discretionary leave for CPD/other training</b>  | Training will generally only be approved by a Headteacher when it is essential for either CPD or to enhance capability to the advantage of the school. When it is not possible for such training to take place out of term time, time off will be allowed with pay. Training may however need to be postponed when the needs of the school are such that time off on the dates allocated for the training do not prove to be convenient.   | <b>Paid</b>                                       |
| <b>Leave for medical screening</b>   | Wherever possible such screening will take place outside of term time. However, where this is proved to be not possible, necessary paid time off will be granted for medical screening including cancer screening where this is required by the employee's medical advisors.   | <b>Paid</b>                                       |
| <b>Other 'special' discretionary leave</b>   |  |   |
| <b>Leave for Trade Union activities</b>  | Where it is necessary for a trade union representative to carry out legitimate trade union business during term time, they will be allowed appropriate time off with pay. It will be expected that most of trade union activity will take place outside of school hours.   | <b>Paid</b>                                       |
| <b>Leave for reservists (Royal Naval Reserves, Royal Marines Reserves, Army Reserve and Royal Auxiliary Air Force)</b> | It will be expected that reservists arrange training outside of term time. In exceptional circumstances the Headteacher may allow paid leave to attend annual training. This is a 15-day continuous training course, sometimes referred to as 'Annual Camp'. This may take place at a training establishment, as an attachment to a Regular Unit, a training exercise or a combination of any of these. Training normally takes place within the UK, although each year some Reservists train overseas.<br><br><b>Employer's legal responsibilities under The Reserve Forces (Safeguard of Employment) Act 1985 (SOE 85) are as follows:</b> | <b>Paid</b>                                       |

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|   | <p>If your Reservist employee is mobilised, when they return you have an obligation to reinstate them in the same role and on equally favourable terms and conditions as before (or as near as practicable). The Ministry of Defence aims to give at least 28 days' notice of mobilisation, although the Reserve Forces Act 1996 gives no statutory requirement for a warning period prior to a Reservist being called out.</p> <p>If a Reservist is mobilised and you believe their absence would cause serious harm to your business or a related business, you have the right to seek exemption, deferral or revocation of the mobilisation.</p> <p>If your Reservist is mobilised you don't have to pay them any salary or associated benefits (such as pension or company car) for the duration of their operational duty. A Reservist can claim for any benefits you stop so they won't be worse off.</p> <p>You are also eligible for financial assistance to cover the costs of finding a temporary replacement or retraining your Reservist employee under certain circumstances on their return.</p> <p>Further information on employing Reservists can be found on the website; <a href="http://www.sabre.mod.uk/Employers/Employing-a-Reservist">http://www.sabre.mod.uk/Employers/Employing-a-Reservist</a></p> |                      |
| <p><b>Leave for public duties</b></p>                 | <p>Section 50 of the Employment Rights Act 1996 provides for employees to be granted time off work to perform those public duties specified in the section. These are as follows:</p> <ul style="list-style-type: none"> <li>(a) a local authority</li> <li>(b) a statutory tribunal</li> <li>(c) a police authority</li> <li>(d) a board of prison visitors or a prison visiting committee</li> <li>(e) a relevant health body</li> <li>(f) a relevant education body, or</li> <li>(g) the Environment Agency or the Scottish Environment Protection Agency.</li> </ul> <p>It is expected that much of the time spent on such duties will be either out of term time or out of normal working hours. However, where this is not possible and there is no adverse effect on the working of the school, unpaid time off may be approved by the Headteacher.</p>   | <p><b>Unpaid</b></p> |
| <p><b>Court Service (witness or jury service)</b></p> | <p>Most court service is for jury service, but employees may also be called as witnesses.</p> <p>Individuals summoned for jury service are expected to attend court unless they are ineligible, disqualified or excused by the court. Jury service can be deferred. Among the categories who qualify for deferral are teachers during term time. Other</p>   | <p><b>Paid</b></p>   |

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|   | <p>school staff may not automatically be disqualified if called for jury service during term time.</p> <p>Applications for jury service to be excused on grounds of conflict with work requirements are likely to result in deferral, unless excusal is clearly necessary. Each application will be considered on its own merits, and applications must be made by those who have been summoned – employers cannot make them on employees’ behalf.</p> <p>Employees required attending court for jury service or who are summoned to appear as witnesses will be granted paid leave for this purpose.</p> <p>Jurors are entitled to claim for travel and subsistence and for loss of earnings, up to a maximum daily rate. Where employees are entitled to claim for loss of earnings, they must get their employer to complete the appropriate certificate which is issued to all jurors prior to attending court. The arrangements for employees attending court as witnesses vary considerably.</p> <p>Loss of earnings claims must be made by employees from the Court, and these are offset against salary/wage.</p> |   |
| <p><b>Statutory maternity leave</b></p>                                       | <p>All pregnant employees can take up to 26 weeks’ ordinary maternity leave (OML) and up to 26 weeks’ additional maternity leave (AML), making a total of 52 weeks. This is regardless of the number of hours they work or their length of service. Additional maternity leave begins on the day after ordinary maternity leave ends.</p> <p>Once an employee has given notice that she is pregnant, she will be entitled not to be unreasonably refused paid time off work to attend antenatal appointments as advised by a registered medical practitioner, midwife or nurse.</p> <p>To be entitled to take time off for maternity leave and antenatal care, the employee is required to produce a certificate from her doctor, registered midwife or registered health visitor, stating that she is pregnant (usually the MATB1). Except in the case of the first appointment, the employee should also produce evidence of the appointment, such as a medical certificate or appointment card, if requested to do so.</p>   | <p><b>Paid/unpaid (see separate maternity and paternity guidance)</b></p>                           |
| <p><b>Statutory parental leave (some discretion when it can be taken)</b></p> | <p>Employees with more than one year’s continuous service are entitled to 18 weeks’ unpaid leave for each child and adopted child, up to their 18th birthday. Employees need to request leave giving at least 21 days’ notice before the intended start date. Parental leave should be taken in blocks of a week or multiples of a week, and should not be taken as “odd days off”, unless the employer agrees otherwise or the child is disabled.</p>  | <p><b>Up to 4 weeks a year unpaid (18 weeks maximum up to child’s 18<sup>th</sup> birthday)</b></p> |

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|  | <p>Employees cannot take off more than four weeks during a year. A week is based on an employee's working pattern. This entitlement is in addition to any rights to maternity/adoption and/or paternity leave or shared parental leave. Requests for such leave may be postponed for up to six months other than where parental leave has been requested immediately after childbirth/maternity leave or immediately after placement for adoption.</p>   |   |
| <b>Statutory paternity leave</b>       | <p>An employee whose wife, civil partner or partner gives birth to a child, or who is the biological father of the child, is entitled to two weeks' ordinary paternity leave provided he/she has 26 weeks' continuous service by the end of the 15<sup>th</sup> week before the week in which the child is expected. Paternity leave is also available to adoptive parents where a child is matched or newly placed with them for adoption. For more information on adoption rights, please see the separate guidance on Ask Schools' Choice. Either adoptive parent may take ordinary paternity leave where the other adoptive parent has elected to take adoption leave. In respect of an adopted child, the employee must have 26 weeks' continuous service by the week in which the child's adopter is notified of having been matched with the child for adoption. To qualify for paternity leave, the employee must also have, or expect to have, responsibility for the upbringing of the child and be making the request to help care for the child or to support the child's mother. Paternity leave must be taken in a single block of one or two weeks within 56 days of the birth or adoption of the child. If the child is born early, it must be taken from the time of the birth but within 56 days of the expected date of childbirth. Paternity leave can start either from the date the child is born or placed for adoption or from a chosen number of days or weeks after that date.</p> | <p><b>2 weeks paid leave to be taken within 56 days of the birth or adoption of a child</b></p>   |
| <b>Statutory shared parental leave</b> | <p>Shared parental leave is a relatively new right that may enable eligible mothers, fathers, partners and adopters to choose how to share time off work after their child is born or placed for adoption. This could mean that the mother or adopter shares some of the leave with her or his partner, perhaps returning to work for part of the time and then resuming leave later. The first two weeks of the 52-week entitlement must be taken by the mother or primary adopter, but the remaining 50 weeks' entitlement and pay can be shared or split between both parents, if they meet the eligibility criteria.</p>   | <p><b>First 2 weeks taken only by the mother<br/>Remaining 50 weeks can be shared between parents<br/>Paid/unpaid – see separate Shared Parental Leave policy</b></p> |

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| <b>Statutory adoption leave</b> | <p>For the primary adopters of children matched for adoption the rights to adoption leave and pay mirror maternity leave and pay.</p> <p>Primary adopters can take up to 26 weeks' ordinary adoption leave (OAL) and up to 26 weeks' additional adoption leave (AAL), making a total of 52 weeks. This is regardless of the number of hours they work or their length of service.</p> <p>Additional adoption leave begins on the day after ordinary adoption leave ends.</p> | <b>Paid/unpaid – see separate adoption guidance</b> |
| <b>Career break</b>             | <p>Staff may request a period of unpaid leave to take a career break from their role at the Trust. During this time their role will be suspended and they will not be permitted to take up any other form of employment, nor provide consultancy work on a self-employed basis.</p>  | <b>Unpaid</b>                                       |

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## **Schedule 6 Time off for dependents policy**

### **1. About this policy**

- 1.1 The law recognises that there may be occasions when you need to take time off work to deal with unexpected events involving one of your dependants.
- 1.2 This time off for dependants policy gives all employees the right to take a reasonable amount of unpaid time off work to deal with certain situations affecting their dependants.
- 1.3 At the discretion of the CEO, employees may take 2 days paid leave for discretionary leave or discretionary additional leave for carers.
- 1.4 No-one who takes time off in accordance with this policy will be subjected to any detriment.
- 1.5 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Reasonable unpaid time off**

- 2.1 You have a right to take a reasonable amount of unpaid time off work when it is necessary to:
    - (a) provide assistance when a dependant falls ill, gives birth, is injured or assaulted;
    - (b) make longer-term care arrangements for a dependant who is ill or injured;
    - (c) take action required in consequence of the death of a dependant;
    - (d) deal with the unexpected disruption, termination or breakdown of arrangements for the care of a dependant (such as a child-minder falling ill); and/or
    - (e) deal with an unexpected incident involving your child while a school or another educational establishment is responsible for them.
  - 2.2 A **dependant** for the purposes of this policy is:
    - (a) your spouse, civil partner, parent or child;
    - (b) a person who lives in the same household as you, but who is not your tenant, lodger, boarder or employee; or
    - (c) anyone else who reasonably relies on you to provide assistance, make arrangements or take action of the kind referred to in paragraph 2.1
  - 2.3 This policy applies to time off to take action which is necessary because of an immediate or unexpected crisis. This policy does not apply where you need to take planned time off or provide longer-term care for a dependant. If this is the case, you should take advice from your line manager.
  - 2.4 Whether action is considered necessary will depend on the circumstances, including nature of the problem, the closeness of the relationship between you and the dependant, and whether anyone else is available to assist. Action is unlikely to be considered necessary if you knew of a problem in advance but did not try to make alternative care arrangements.
  - 2.5 Reasonable time off in relation to a particular problem will not normally be more than two days. However, we will always consider each set of circumstances on their facts.
- ### **3. Exercising the right to time off**
- 3.1 You will only be entitled to time off under this policy if, as soon as is reasonably practicable, you tell your line manager:
    - (a) the reason for your absence; and
    - (b) how long you expect to be away from work.
  - 3.2 If you fail to notify us as set out above, you may be subject to disciplinary proceedings under our Disciplinary Procedure for taking unauthorised time off.

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- 3.3 We may in some cases ask you to provide evidence for your reasons for taking the time off, either in advance or on your return to work. Suspected abuse of this policy will be dealt with as a disciplinary issue under our Disciplinary Procedure.

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## **Schedule 7 Compassionate leave policy**

### **1. About this policy**

- 1.1 Compassionate leave is designed to help you cope with the death of a close relative, deal with necessary arrangements and attend their funeral. It may also be granted where a close relative is seriously or critically ill.
- 1.2 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Entitlement**

You are entitled to take paid compassionate leave as set out in **Schedule 5** sickness absence policy (table of paid and unpaid leave) within this handbook, this is in respect of a spouse or partner, child, stepchild, grandchild, parent, step-parent, parent-in-law, grandparent, brother or sister, stepbrother or stepsister, or brother or sister-in-law.

- 2.1 We may exercise our discretion to grant a period of paid compassionate leave in respect of any other relative or close friend, depending on the circumstances of each case.
- 2.2 If you are still unable to return to work following an authorised period of compassionate leave you should contact your line manager. It may be appropriate to take a period of annual leave, subject to your manager's approval, or we may at our discretion grant you further unpaid leave in those circumstances.

### **3. Requesting compassionate leave**

- 3.1 We recognise that it may not always be possible to request compassionate leave in advance. However, where it is possible, you should make a request to your line manager. You should tell them the reasons for your request and the number of days leave you would like to take.
- 3.2 Where it is not possible to request leave in advance you should contact your line manager as soon as possible to tell them the reason for your absence and the number of days you expect to be absent. Someone can do this on your behalf if necessary.
- 3.3 In exceptional circumstances we may have to refuse a request for compassionate leave and will give you a written explanation of the reasons. If you are dissatisfied with this decision you may make a complaint under our Grievance Procedure.

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## Schedule 8 Flexible working policy

### 1. About this policy

- 1.1 We are committed to providing equality of opportunity in employment and to developing work practices and policies that support work-life balance. We recognise that, in addition to helping balance work and personal lives, flexible working can raise staff morale, reduce absenteeism, and improve our retention of staff.
- 1.2 This policy gives eligible employees an opportunity to formally request a change to their working pattern in accordance with the statutory procedure for such requests. It also allows any employee to make such a request informally without following the statutory procedure.
- 1.3 Through this policy we will accommodate flexible working where possible, giving careful consideration to, and assessment of the effect of, the requested change on the effective running of the Trust for the benefit of the pupils. Where granting flexible working would impact on that, requests may not be granted. Requests will be handled in a reasonable manner and appropriate consultation will take place with employees.
- 1.4 No-one who makes a request for flexible working, or intends to make such a request will be subjected to any detriment or lose any career development opportunities as a result.
- 1.5 All requests will be handled appropriately and will not discriminate unlawfully against any employee in relation to any of the protected characteristics set out in the Equality Act 2010. Any requests for a reasonable adjustment relating to an employee's disability should be dealt with separately rather than as a flexible working request.
- 1.6 This policy does not form part of any employee's contract of employment, and we may amend it at any time.

### 2. Scope and purpose of this policy

- 2.1 This policy applies to all employees. It does not apply to agency workers, consultants or self-employed contractors.
- 2.2 Employees have a statutory right to request flexible working from day one of their employment. That right is recognised by the formal procedure in this policy.
- 2.3 Any employee interested in flexible working can request an informal meeting with their line manager to discuss the different options and the effect of their proposed work pattern on colleagues and service delivery before submitting a formal or informal request.

### 3. Responsibility for implementing this policy

- 3.1 The Trust Board has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. The Trust Board has delegated day-to-day responsibility for operating the policy and ensuring its maintenance and review to the CEO.

### 4. Forms of flexible working

- 4.1 Flexible working can incorporate a number of possible changes to working arrangements:
  - (a) reduction or variation of working hours;
  - (b) reduction or variation of the days worked; and/or
  - (c) working from a different location (for example, from home), please refer to the Agile Working Policy, Schedule 27.
- 4.2 Such changes may also involve starting a job share; working a set number of hours a year, rather than a week (annualised hours); working from home (whether for all or part of the week); working only during term-time (part-year working); working compressed hours; working flexi-time. Some of these arrangements may not be possible due to the nature of the work undertaken by the employee making the request but decisions will be made in consultation with employees.

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4.3 Employees should be aware that changes to working hours will affect pay and other benefits, for example pension, annual leave entitlement.

## **5. Eligibility for the formal right to request procedure**

5.1 Requests under the formal procedure set out in this policy can only be made by employees who meet the criteria set out below.

5.2 To be eligible to make a flexible working request under the formal procedure you must:

- (a) be an employee;
- (a) not have already made two formal requests to work flexibly during the last 12 months;
- (b) Only have one live request for flexible working at any one time.

5.3 A request will be considered as live unless any of the following apply:

- (a) A decision on the request has been made by the employer;
- (b) the request has been withdrawn;
- (c) an outcome to the request has been mutually agreed by the employer and employee; or
- (d) the statutory timeframe to respond to the request has expired without a decision, withdrawal or a mutually agreeable outcome. It is envisaged this will only happen in rare and exceptional circumstances and the Trust will always endeavour to comply with statutory deadlines.

### **1.1**

5.4 A request continues to be live during any appeal or any extension to the procedure that an employer and employee have agreed.

## **6. Making a formal flexible working request**

6.1 You will need to submit a written application if you would like your flexible working request to be considered under the formal procedure. Once we have received a request we will consider it.

6.2 Your written and dated application should be submitted to the Head Teacher and, in order to meet the requirements of the formal procedure and to help them to consider your request, should:

- (a) state that it is a statutory flexible working request;
- (b) provide as much information as you can about your current and desired working patterns, including working days, hours and start and finish times/
- (c) give the date from which you want your desired working pattern to start
- (d) state whether you have made any previous formal requests for flexible working within the last 12 months, and if so, when
- (e) be submitted in good time and ideally at least two months before you wish the changes you are requesting to take effect.

6.3 We might be able to agree your proposal without the need for a meeting (which is the next stage of the formal procedure). If that is the case, the Head Teacher will write to you, confirming the decision and explaining the changes that will be made to your contract of employment.

6.4 If your proposal cannot be accommodated, discussion between you and the Head Teacher may result in an alternative working pattern that can assist you.

## **7. Formal Procedure: Meeting**

7.1 Where necessary, the Head Teacher will arrange to meet with you as soon as is practicably possible and without unreasonable delay after receiving your written application. The meeting may also be attended by a member of the HR Department We will inform you if there is a delay in arranging this meeting.

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7.3 You may bring a companion to the meeting if you wish who may be your trade union representative or a work colleague. Your companion will be entitled to speak during the meeting and confer privately with you, but may not answer questions on your behalf.

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- 7.4 The meeting will take place in private and can be held in person or remotely via online video conferencing, or where neither are possible, via telephone call. The content of the meeting and the way it is conducted should allow a reasonable discussion and consideration of the request. An accurate record of the discussion will be kept in writing.
- 7.5 The meeting will be used to discuss the working arrangements you have requested. During the meeting we will jointly consider and discuss any alternative flexible working options that may be available and suitable for both you and the organisation if the original request cannot be met.
- 8. Formal procedure: decision**
- 8.1 Following the meeting, the Head Teacher will consider your request carefully and notify you of the decision in writing as soon as possible.
- 8.2 Each request will be considered on a case by- -case basis; agreeing to one request will not set a precedent or create the right for another employee to be granted a similar change to their working patterns.
- 8.3 If your request is accepted, the Head Teacher will discuss with you how and when the changes might best be implemented and will confirm these in writing. Such confirmation will include details of the new working arrangements, details of any trial period, an explanation of changes to your contract of employment and the date on which they will commence. You will be asked to sign and return a copy of the letter. This will be placed on your personnel file to confirm the variation to your terms of employment. There may also be some additional practical matters, such as arrangements for handing over work, that your Head Teacher will discuss with you.
- 8.4 The Head Teacher may suggest starting new working arrangements under an initial trial period to ensure that they meet your needs and those of the Trust. We will set a review date to meet with you again shortly before the end of the trial period to discuss how the new arrangements are working.
- 8.5 Unless otherwise agreed (and subject to any agreed trial period) changes to your terms of employment will be permanent. You will only be able to make one other formal request until 12 months after the date of your most recent request.
- 8.6 If the Head Teacher needs more time to make a decision, they will discuss this with you. For example, they may need time to investigate how your request can be accommodated or to consult several members of staff.
- 8.7 There will be circumstances where, due to business and operational requirements, we are unable to agree to a request. In these circumstances, the Head Teacher will write to you:
- (a) giving the business reason(s) for turning down your application;
  - (b) explaining why the business reasons apply in your case; and
  - (c) setting out the appeal procedure.
- 8.8 If we reject a request it will be for one or more of the following eight business reasons:
- (a) the burden of additional costs;
  - (b) detrimental effect on ability to meet pupil and/or Trust demand;
  - (c) inability to reorganise work among existing staff;
  - (d) inability to recruit additional staff;
  - (e) detrimental impact on quality;
  - (f) detrimental impact on performance;
  - (g) insufficiency of work during the periods that you propose to work; and
  - (h) planned changes.
- 8.9 We will also set out such additional information as is reasonable to help explain the decision.

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## **9. Formal procedure: appeal**

- 9.1 You may appeal against the decision if your request is rejected, or an alternative arrangement from the one you requested is offered. For example, this may be on the grounds that new information is now available that was not available to be considered or if you feel your request was not handled reasonably in line with this policy.
- 9.2 Your appeal must:
- (a) be in writing and dated;
  - (b) set out the grounds on which you are appealing; and
  - (c) be sent to the Head Teacher within 14 days of the date on which you received the written rejection of your request.
- 9.3 The Head Teacher will arrange for a meeting to take place as soon as possible following receipt of your appeal. The meeting will be held at a convenient time for all those attending and, as at the meeting that considered your request, you may be accompanied by a companion who may be your trade union representative or another work colleague.
- 9.4 Where possible, the appeal meeting will be conducted by another Head Teacher of the Trust or the CEO who has not been previously involved in considering your request.
- 9.5 You will be informed in writing of the appeal decision as soon as possible following the appeal meeting.
- 9.6 If your appeal is upheld, you will be advised of your new working arrangements, details of any trial period, an explanation of changes to your contract of employment and the date on which they will commence. You will be asked to sign and return a copy of the letter. This will be placed on your personnel file to confirm the variation to your terms of employment. There may also be some additional practical matters, such as arrangements for handing over work, that your Head Teacher will discuss with you.
- 9.7 You should be aware that changes to your terms of employment will be permanent and you will only be able to make one other formal request until 12 months after the date of your original application.
- 9.8 If your appeal is rejected, the written decision will give the business reason(s) for the decision and explain why the reason(s) apply in your case. You will only be able to make one other formal request until 12 months after the date of your original application.

## **10. Timescales**

- 10.1 Requests will be dealt with within a period of two months from first receipt to notification of the decision on appeal.
- 10.2 As a guide and to help ensure that requests are dealt with within this timescale:
- (a) a meeting will normally be held with you within 14 days of your request being received;
  - (b) you will normally be informed in writing of the decision within 14 days of the meeting; and
  - (c) where an appeal is lodged, an appeal meeting will normally take place within 14 days of receipt of the appeal and the outcome will be notified in writing within 14 days of the meeting.
- 10.3 However, there may be exceptional occasions when it is not possible to complete the procedure within this time limit. Where an extension of time is agreed with you, the Head Teacher will write to you confirming the extension and the date on which it will end.
- 10.4 If you withdraw a formal request for flexible working, you will only be eligible to make one other formal request for 12 months from the date of your original request.
- 10.5 In certain circumstances, a request made under the formal procedure will be treated as withdrawn. This will occur if:

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- (a) you fail to attend a meeting and a re-arranged meeting, or an appeal meeting and a re-arranged appeal meeting, without good cause; or
  - (b) you unreasonably refuse to provide information we require to consider your request, without good cause.

In such circumstances, the Head Teacher will write to you confirming that the request has been treated as withdrawn.

## **11. Making an informal flexible working request**

- 11.1 Employees who are ineligible to make a formal request as they have already made two requests within the last 12 months, and who wish to make an informal request for flexible working may make a request to Head Teacher, who will consider it according to our business and operational requirements.
- 11.2 It will help your Head Teacher to consider your request if you:
  - (a) make your request in writing and confirm whether you wish any change to your current working pattern to be temporary or permanent;
  - (b) provide as much information as you can about your current and desired working pattern, including working days, hours and start and finish times, and give the date from which you want your desired working pattern to start.
- 11.3 Your Head Teacher will advise you what steps will be taken to consider your request, which may include inviting you to attend a meeting, before advising you of the outcome of your request and the impact on your contract of employment.

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## **Schedule 9 Time off for public duties policy**

### **1. About this policy**

- 1.1 We wish to enable employees to perform any public duties that they may be committed to undertake and so will give them time off to do so where it does not conflict with the operational needs of our business.
- 1.2 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Jury service**

- 2.1 You should tell your line manager as soon as you are summoned for jury service and provide a copy of your summons if requested.
- 2.2 Depending on the demands of our business we may request that you apply to be excused from or defer your jury service.
- 2.3 We are not required by law to pay you while you are absent on jury service. You will be advised at court of the expenses and loss of earnings that you can claim. Please refer to the 'sickness absence policy', table of paid and unpaid leave for more information.

### **3. Voluntary public duties**

- 3.1 Employees are entitled to a reasonable amount of unpaid time off work to carry out certain public duties, including duties as a tribunal member, magistrate, local councillor, member of an NHS Trust, prison visitor, police station lay visitor or school governor.
- 3.2 If you are unsure whether a public service that you perform is covered by this policy you should speak to your line manager.
- 3.3 As soon as you are aware that you will require time off for performance of a public service you should notify your line manager in writing, providing full details of the time off that is being requested and the reasons for your request. In order that arrangements can be made to cover your duties in your absence you should make your request in good time.
- 3.4 Each request for time off will be considered on its merits taking account of all the circumstances, including how much time is reasonably required for the activity, how much time you have already taken, and how your absence will affect the business.
- 3.5 Please refer to **schedule 5**, sickness absence policy (table of paid and unpaid leave) for more information.

### **4. Reserve forces duties**

- 4.1 We are aware that employees who are members of the Reserve Forces (the Territorial Army, Royal Navy Reserve, Royal Marines Reserve or Royal Auxiliary Air Force) may be called-up at any time to be deployed on full-time operations, and are expected to attend regular training.
- 4.2 Please refer to **schedule 5**, sickness absence policy (table of paid and unpaid leave) for more information.
- 4.3 If we receive notice that you have been called-up for active service we may apply to an adjudication officer for the notice to be deferred or revoked if your absence would cause serious harm to our business (which could not be prevented by the grant of financial assistance).
- 4.4 Once your military service has ended you may submit a written application for reinstatement to your employment. This should be made by the third Monday following the end of your military service and you should notify us of the date on which you will be available to restart work.

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- 4.5 If it is not reasonable and practicable to reinstate you into your former employment we will offer you the most favourable alternative on the most favourable terms and conditions which are reasonable and practicable.

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## **Schedule 10 Time off for training policy**

### **1. About this policy**

- 1.1 We are committed to developing the skills of our employees and recognise that training can benefit us and our staff. Staff should receive training appropriate to their role, subject to business need, operational and budgetary considerations.
- 1.2 Eligible employees also have a statutory right to request time off work for study or training. The purpose of this policy is to provide a framework within which we can consider those requests.
- 1.3 No-one who requests time off under this policy will be subjected to any detriment or lose any career opportunities as a result.
- 1.4 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Who is covered by this policy?**

- 2.1 This policy applies to employees. It does not apply to agency workers, consultants or self-employed contractors.
- 2.2 The following are not covered:
- (a) employees of compulsory school age;
  - (b) (in Wales and Scotland only) employees aged 16 to 18 who have the statutory right to reasonable paid time off for study or training under sections 63A-C of the Employment Rights Act 1996;
  - (c) employees aged 16 to 17 who do not have at least two A-levels (or equivalent) and who are required by the Education Act 2008 to undertake a minimum level of education or accredited training; and
  - (d) employees aged 18 who are still completing a course started under [paragraph 2.2\(b\)](#) or paragraph 2.2(c) above.

### **3. Personnel responsible for this policy**

- 3.1 Our board of trustees (the board) has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. Day-to-day responsibility for operating the policy and ensuring its maintenance and review has been delegated to line managers.
- 3.2 Managers have a specific responsibility to ensure the fair application of this policy and all members of staff are responsible for supporting colleagues and ensuring its success.
- 3.3 Managers are responsible for identifying and monitoring staff training and development needs on an ongoing basis. Employees who wish to undertake any form of training relevant to their role should raise the matter informally with their managers in the first instance.

### **4. When can staff request time off to train?**

- 4.1 To be eligible to make a formal request under this policy, you must:
- (a) be an employee;
  - (b) have worked for us continuously for 26 weeks at the date your request is made;
  - (c) have made no previous formal requests under this policy in the last 12 months.
- 4.2 We will ignore the fact that a request was made less than 12 months ago in the following circumstances:
- (a) if we agreed to the earlier request but the training was cancelled or you were unable to start it because of unforeseen circumstances that were not your fault; or
  - (b) if you withdrew the earlier request because it was not valid.

### **5. What type of training is covered?**

- 5.1 Any type of study or training can be requested under this policy. It does not matter how or where it takes place. For example, it could be:

- (a) training provided in the workplace;
- (b) a one-day training course provided by an external training provider;
- (c) a part-time college course;
- (d) an online training module (e-learning);
- (e) a distance learning course.

- 5.2 The study or training does not need to lead to a formal qualification. The only limitation is that it must be for the purpose of:
- (a) improving your effectiveness at work; and
  - (b) improving the performance of our business.

## **6. Making a formal time off to train request**

- 6.1 To make a formal request under this policy you should submit it in writing to your line manager. Please include the following information:

- (a) a statement that the request is made under this policy;
- (b) the date of the request;
- (c) the subject matter of the study or training;
- (d) where and when it would take place;
- (e) who would provide or supervise it;
- (f) what qualification (if any) it would lead to;
- (g) how you think the study or training would improve your effectiveness at work;
- (h) how you think the study or training would improve the performance of the business; and
- (i) if you have made any previous application under this policy, the date of that application and how it was made (for example, whether it was by email or letter and who you sent it to).

- 6.2 If we agree to your request without the need for a meeting, we will tell you in writing and include the information in paragraph 8.1.

- 6.3 We will treat your request as withdrawn if:

- (a) you tell us you are withdrawing the request;
- (b) you fail to attend two meetings under paragraph 7. without reasonable cause; or
- (c) you unreasonably refuse to provide information we need to consider your request.

In those cases, your line manager will write to confirm that your request has been treated as withdrawn. You will not normally be able to make another formal request for 12 months from the date of your original request.

## **7. Meeting**

- 7.1 Your line manager will arrange to hold a meeting with you at a mutually convenient time and place, usually within 28 days of receiving your formal request (unless paragraph 7.2 applies or we have agreed a longer time limit in writing under paragraph 11).

- 7.2 If the person who would ordinarily hold the meeting is on annual leave or sick leave at the time of your request, the meeting will be held within 28 days of their return or within 8 weeks of your request, whichever is sooner.

- 7.3 The meeting will be used to discuss your request and, if appropriate, explore any alternatives.

- 7.4 You may bring a colleague to the meeting as a companion if you wish. Your companion may speak during the meeting and confer privately with you, but should not answer questions on your behalf.

- 7.5 If your chosen companion is unable to attend at the time set for the meeting, you should contact your line manager and we will try to rearrange the meeting. If the meeting cannot be rearranged within seven days of the original date, we may suggest that you bring a different companion or come alone.

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7.6 We will tell you our decision in writing within 14 days of the meeting unless we have agreed a longer time limit in writing.

## **8. If we agree to your request**

8.1 Where we agree to all or part of your request we will give you a written and dated notice containing the following information:

- (a) which part of your request is agreed;
- (b) if any part is not agreed, the information in paragraph 9.1;
- (c) the subject of the agreed study or training;
- (d) where and when it will take place;
- (e) who will provide or supervise it;
- (f) what qualification (if any) it will lead to;
- (g) any changes to your working hours in order to accommodate the agreed study or training;
- (h) whether you will be paid for carrying out the study or training;
- (i) how any tuition fees or other direct costs of the agreed study or training will be met.

8.2 In some cases, we may suggest changes to your request. For example, we may suggest a different course of study or training, or we may suggest an alternative time or place. These may be discussed at the meeting or may require discussion afterwards. The written notice of our decision will set out any changes that you have agreed to. We will ask you to sign and return a copy of the notice to show your agreement.

8.3 We do not have to pay you while you are taking time off for study or training requested under this policy, unless this is necessary in order to comply with minimum wage legislation. However, in some cases we may agree to pay you for some or all of the time off.

8.4 We do not have to pay the costs of study or training requested under this policy (including any associated costs such as travel expenses). However, in some cases we may agree to meet some or all of those costs.

## **9. If we reject all or part of your request**

9.1 Where we reject all or part of your request, we will give you a written and dated notice containing the following information:

- (a) which part of your request is rejected;
- (b) if any part is agreed, the relevant information in paragraph 8.1 above;
- (c) which of the grounds for rejection set out below applies and why; and
- (d) the appeal procedure.

9.2 We may reject your request for any of the following reasons:

- (a) that the proposed study or training would not in our view improve your effectiveness at work and the performance of the business;
- (b) the burden of additional costs;
- (c) detrimental effect on ability to meet customer demand;
- (d) inability to reorganise work among existing staff;
- (e) inability to recruit additional staff;
- (f) detrimental impact on quality;
- (g) detrimental impact on performance;
- (h) insufficiency of work during the periods that you propose to work;
- (i) planned structural changes; or
- (j) any other reasons that the Government sets out in future regulations.

## **10. Appeal**

10.1 You may appeal if we reject all or part of your request. Your appeal must:

- (a) be in writing and dated;
- (b) set out the grounds on which you are appealing; and

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- (c) be sent to the person named in the outcome letter (see paragraph 9.1) no more than 14 days after you receive the written notice of our decision.

10.2 We may decide to uphold your appeal in full without a meeting. In all other cases, arrangements will be made for an appeal meeting to take place within 14 days of receiving your appeal, unless we have agreed a longer time limit in writing). The meeting will be held at a convenient time for all those attending and you may bring a colleague as a companion.

10.3 The appeal meeting will be held by a member of the senior management team. Your manager may also be present.

10.4 We will tell you the outcome of the appeal in writing within 14 days of the meeting, unless we have agreed a longer time limit in writing). That decision will be final and you will not be able to make another formal request until 12 months after the date of your original request.

10.5 If we uphold your appeal, we will give you the information set out in paragraph 8.1 above.

10.6 If we reject your appeal, we will explain our reasons to you in writing.

#### **11. If we need more time**

There may be exceptional occasions when it is not possible to adhere to the time limits in this policy. For example, we may need to delay holding a meeting or notifying you of the decision. We will ask for your agreement to extend the time limit, and will confirm in writing any agreement reached. In many cases this will be in your interests as it will enable the appropriate person to consider your request properly.

#### **12. Changes to agreed study or training arrangements**

12.1 You must tell us in writing immediately if:

- (a) you do not start the agreed study or training for any reason (for example, if it is cancelled);
- (b) you do not complete the agreed study or training; or
- (c) you undertake (or wish to undertake) a different course of study or training.

12.2 You should also tell us immediately if you become aware of any changes to agreed study or training, including changes to the timing or content of the course.

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**Schedule 11 Health and safety policy**

Please also refer to our Health & Safety Policy published on the policies section of the Raedwald Trust website.

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## **Schedule 12 Smoking policy**

### **1. About this policy**

- 1.1 We are committed to protecting your health, safety and welfare and that of all those who work for us by providing a safe place of work and protecting all workers, service users, customers and visitors from exposure to smoke.
- 1.2 All of our workplaces (including our vehicles) are smoke-free in accordance with the Health Act 2006 and associated regulations. All staff and visitors have the right to a smoke-free environment.
- 1.3 This policy does not form part of any employee's contract of employment and it may be amended at any time.

### **2. Where is smoking banned?**

- 2.1 Smoking is not permitted on and around Raedwald Trust premises. The ban applies to anything that can be smoked and includes, but is not limited to, cigarettes, electronic cigarettes, pipes (including water pipes such as shisha and hookah pipes), cigars and herbal cigarettes.
- 2.2 No-smoking signs are displayed at the entrances to our workplace.
- 2.3 Anyone using our vehicles, whether as a driver or passenger, must ensure the vehicles remain smoke-free. Any of our vehicles that are used primarily for private purposes are excluded from the smoking ban.

### **3. Breaches of the policy**

- 3.1 Breaches of this policy by any employee will be dealt with under our Disciplinary Procedure and, in serious cases, may be treated as gross misconduct leading to summary dismissal.
- 3.2 Smoking in smoke-free premises or vehicles is also a criminal offence and may result in a fixed penalty fine and/or prosecution.

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## **Schedule 13 Stress at work policy**

### **1. About this policy**

- 1.2 The Raedwald Trust has developed a managing stress and wellbeing policy to manage its obligations to promote positive mental health and wellbeing of all staff. It covers our commitment to protect the health, safety, and wellbeing of our staff; the responsibilities of managers and others for maintaining psychological health, health promotion initiatives, communicating and training on health issues the range of support available for the maintenance of mental health and organisational commitment to handling individual issues.
- 1.3 The aim of this policy is to describe the Trust's commitment to promoting positive mental health and wellbeing of staff in its broadest, holistic sense, setting out how the Trust fulfil our legal obligations, the responsibilities of different functions and specialists and the range of services available to help staff maintain health and wellbeing. The Trust recognises that wellbeing and performance are linked. Improving staff's ability to handle pressure and to balance work and home life will ultimately lead to improved performance.
- 1.4 The Trust recognises the importance of identifying and tackling the causes of work-related stress. We also recognise that personal stress, while unrelated to the workplace, can adversely affect the wellbeing of staff at work.
- 1.5 Mental wellbeing is relevant for all staff, which means every member of staff can play a part in improving wellbeing in the workplace. By addressing mental health issues, the Trust can improve the general wellbeing of staff, reduce absenteeism, lower staff turnover and increase productivity.
- 1.6 This procedure does not form part of any employee's contract of employment, and it may be amended at any time. We may vary any of the provisions detailed within this policy without consultation. It has been formally adopted by the Trust Board.
- 1.7 Any information you provide to us about your health will be processed in accordance with our Data Protection Policy. We recognise that such data is sensitive and will handle it in a confidential manner.

### **2 Who is covered by the policy?**

- 2.1 The procedure applies to all employees regardless of length of service. It also applies to any agency workers, casual staff, self-employed contractors/consultants, and volunteers.

### **3 Legal obligations**

- 3.1 Raedwald Trust have a legal duty to take reasonable care to ensure that your health is not put at risk by excessive pressures or demands arising from the way work is organised.
- 3.2 This policy takes account of our obligations under the Health and Safety at Work etc Act 1974, Management of Health and Safety at Work Regulations 1999, Employment Rights Act 1996, Protection from Harassment Act 1997, Working Time Regulations 1998 and Equality Act 2010.

### **4 Understanding stress and mental health**

- 4.1 Stress is the adverse reaction people have to excessive pressures or demands placed on them. Sustained over a period of time, stress can lead to mental and/or physical illness.
- 4.2 Mental health is a term used to describe our emotional, psychological, and social wellbeing; it affects how we think, feel and act and how we cope with the normal pressures of everyday life. Positive mental health is rarely an absolute state since factors inside and outside work affect mental health, meaning that we move on a spectrum that ranges from being in good to poor mental health.
- 4.3 There is an important distinction between working under pressure and experiencing stress. Certain levels of pressure are acceptable and normal in every job. They can improve performance, enable individuals to meet

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their full potential and provide a sense of achievement and job satisfaction. However, when pressure becomes excessive it produces stress and undermines mental health.

4.4 Pressures outside the workplace, whether the result of unexpected or traumatic events such as accidents, illness, bereavement, family breakdown or financial worries, can result in stress and poor mental health. They can also compound normal workplace pressures.

4.5 We recognise that individuals react to similar situations in different ways and that what triggers stress and poor mental health varies from person to person.

## **5 Our approach to mental wellbeing**

5.1 We will:

5.1.1 Promote a culture of open communication by providing both formal and informal channels through which staff can raise concerns.

5.1.2 Take account of stress and mental wellbeing when planning and allocating workloads. We will provide opportunities to discuss these through our appraisal processes and wellbeing checks.

5.1.3 Monitor working hours and overtime to ensure that staff are not overworking and monitor holidays to ensure that staff are using their entitlement appropriately.

5.1.4 Ensure risk assessments include, or specifically address work-related stress.

5.1.5 Facilitate requests for flexible working where reasonably practicable in accordance with our Flexible Working Policy.

5.1.6 Consider reasonable adjustments on a temporary or permanent basis, and in conjunction with relevant medical advice, where employees have advised us of concerns regarding their mental health.

5.1.7 Ensure that in any workplace reorganisation our change management processes are designed to minimise uncertainty and stress.

5.1.8 Implement policies and procedures to address factors that can cause or worsen stress in particular so that we can provide a workplace free from harassment, bullying and victimisation and address inappropriate behaviour through disciplinary action.

5.1.9 Provide training to help all staff understand and recognise the causes of work-related stress and mental ill health, the impact of stress from factors in everyday life and the steps they can take to protect and enhance their own mental wellbeing and that of their colleagues.

5.1.10 Provide support services such as wellbeing check ins, occupational health and employee assistance programme (EAP) for health first aiders for staff affected by or absent by reason of stress.

## **6 Responsibilities**

6.1 Employees

All staff should ensure that they are familiar with this policy and act in accordance with its aims and objectives. Staff should plan and organise their work to meet personal and organisational objectives and co-operate with support, advice, and guidance that may be offered by line managers or Central HR. Anyone who experiences, or is aware of a situation that may result in work-related stress or undermine mental wellbeing at work should speak to their line manager or Central HR.

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## 6.2 Line managers

All line managers have a responsibility to recognise potential issues of work-related stress or mental ill health in the staff they manage. They should seek advice from Central HR in the event that they have concerns. All managers should provide support to staff by working with Central HR and through making appropriate referrals to the Occupational Health Department. In particular, they need to:

- Promote a culture of open communication.
- Effectively plan and provide feedback on performance.
- Ensure that staff receive necessary training and support.
- Monitor workloads and reallocate work where necessary.
- Ensure that staff understand the standards of behaviour expected of them and others, and act on behaviour that falls below those standards.

## 6.3 Human resources support

The Trust will engage with their HR support to develop Trust-wide policies and procedures, to protect the wellbeing of employees, assist line managers in supporting individuals, and liaise as appropriate with occupational health and other medical professionals, with the object of helping employees to maintain good psychological health.

The Trust operates practices and policies that ensure staff are able to achieve a satisfactory balance between their work and other commitments and adhere to the working limits set out in the Working Time Regulations 1998.

## 6.4 Occupational health

The Trust has engaged occupational health professionals who will provide a comprehensive service designed to help staff stay in work, or to return to work, after experiencing mental health problems. This will include preparing medical assessments of individuals' fitness for work following referrals from the Trust, liaising with GPs and working with individuals to help them to retain employment/engagement.

Occupational health professionals will play a critical part in developing rehabilitation plans for staff returning to work after absences related to mental ill health, and work with GPs and line managers on designing/amending jobs and working environments to ensure that rehabilitation is successful. Advice will also be taken from our occupational health professionals regarding design and implementation of any suitable health promotion and lifestyle behaviour management programmes, including initiatives on managing pressure and ongoing health conditions at work.

## 6.5 Employee assistance programme provider

The provider of external employee assistance services is Education Support EAP, tel: 08000 856 148, they will alert the Trust's management to clusters or 'hotspots' of psychological risk in the organisation, drawing on anonymised data provided by calls to its 24-hour helpline and information from face-to-face counselling with staff.

## 7 Health promotion initiatives

7.1 The Trust runs a range of initiatives in partnership with an external provider, Harmonious Society, to raise awareness of health and lifestyle issues affecting mental health and wellbeing. The CEO will have primary responsibility for leading these programmes, but line managers and staff will be expected to participate. These programmes will be evaluated to determine their effectiveness.

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## 8 Training and communications

- 8.1 Line managers and staff should regularly discuss individual training needs to ensure that staff have the necessary skills to adapt to ever-changing job demands. An examination of training needs will be particularly important prior to, and during, periods of organisational change.
- 8.2 Line managers will receive training so they are able to recognise the symptoms and causes of mental ill health.
- 8.3 Staff will receive training in mental health awareness, so they are able to recognise the symptoms of mental ill health in themselves and others in addition to recognising causes.
- 8.4 Managers and staff are encouraged to participate in communication/feedback exercises. All staff are expected to be aware of the importance of effective communication and to use the media most appropriate to the message, for example team meetings, one-to-one meetings, electronic communications and Trust-wide methods. The Trust will ensure that structures exist to give staff regular feedback on their performance, and for them to raise concerns.
- 8.5 The Trust will consider special communication media during periods of Trust change.

## 9 Occupational health support

- 9.1 Central HR can contact the organisation's occupational health service. Staff can also speak to their line managers if they would like to be considered for support from occupational health. Various occupational services are available and will be considered on an individual basis.
- 9.2 Workplace wellbeing services provided by the occupational health team include:
- Pre-employment screening.
  - Fitness-for-work assessments.
- 9.3 If staff believe that their work, or some aspect of it, is putting their wellbeing at risk they should, in the first instance, speak to their line manager or Central HR. The discussion should cover workload and other aspects of job demands and raise issues such as identified training needs.
- 9.4 A referral to the occupational health team will be made if this is considered appropriate after an individual's initial discussion with their manager or Central HR. Discussions between staff and the occupational health professionals are confidential, although the occupational health team will provide a report on the individual's fitness to work, and any recommended adaptations to the working environment, to the Trust.

## 10 Other services

- 10.1 Other measures available to support staff in maintaining health and wellbeing include:
- An employee assistance programme – Education Support tel: 08000 856148
  - Procedures for reporting and handling inappropriate behaviour (for example bullying and harassment).
  - Special leave arrangements (please refer to the Sickness Absence Policy).
  - Opportunities for flexible working (please refer to the schedule in this handbook)
  - Support for workers with disabilities; and
  - The Trust's Grievance Policy.
  - Help and information can also be obtained from Mind, the mental health charity: [www.mind.org.uk](http://www.mind.org.uk) or the Samaritans: [www.samaritans.org](http://www.samaritans.org).

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10.2 If any member of staff is considered by their line manager or colleagues to be at serious risk of self-harm, or of harming others, action must be taken straight away. The matter should be referred to Central HR who will seek medical advice [from the occupational health department] if that is reasonably practicable. Every effort will be made to contact any person nominated by the member of staff as an emergency contact. Where necessary the emergency services will be called. The wellbeing of the member of staff and those around them will always be our first concern.

## **11 Addressing work-related stress**

11.1 If you believe you are suffering from work-related stress you should discuss this with your line manager in the first instance. If you feel unable to do so you should contact Central HR. You should also access the support services referred to in clause 7.

11.2 Once an issue affecting your health comes to the attention of Central HR, we will discuss with you what steps can be taken to address that issue. Those steps may include any of the following:

- A review of your current job role, responsibilities, workload and working hours. Adjustments may be agreed to these, on a temporary basis and subject to further review, where appropriate.
- Where it appears that stress has been caused by bullying or harassment, investigation under our disciplinary and/or grievance procedures.
- Referral for medical advice, treatment and/or a medical report to be provided by the occupational health department, our medical advisers or any specialist or GP who has been treating you.
- If you are on sickness absence, discussion of an appropriate return to work programme. Our sickness absence policy may be applied.

## **12 Absence due to stress or mental ill health**

12.1 If you are absent due to work-related stress or mental ill health, you should follow the sickness absence reporting procedure contained in your contract and our Sickness Absence Policy.

12.2 In cases of prolonged or repeated absence it may be necessary to apply the procedure set out in our Sickness Absence Policy.

## **13 Reasonable adjustments**

13.1 There may be reasonable adjustments that can be made to your role if you are experiencing a mental health issue. These adjustments could be on a temporary basis, or they could be permanent changes. Examples of the types of adjustments that can be considered are as follows:

- Changes to your physical working environment.
- Changes to your working pattern.
- Adapting the way our policies are applied.
- Reviewing tasks or deadlines to help someone have a reasonable workload while managing their mental health.
- Providing rest areas away from the main staff room to allow an employee to rest away from social demands.
- Modifying supervision to provide regular check-ins, prioritising work, and creating structure in the working day.
- Providing training or coaching to build confidence in skills relevant to the job.
- Agreeing a preferred communication method to help reduce anxiety.

## **14 Confidentiality**

14.1 Information about stress, mental health and mental wellbeing is highly sensitive. Every member of staff is responsible for observing the high level of confidentiality that is required when dealing with information

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about stress or mental health, whether they are supporting a colleague, or because they are otherwise involved in the operation of a workplace policy or procedure.

14.2 A breach of confidentiality may give rise to disciplinary action.

14.3 However, there are occasions when information about stress or mental wellbeing needs to be shared with third parties. For example:

- Where steps need to be taken to address work-related stress such as reallocating work within a team.
- Where medical advice is required on how to support a member of staff, address issues raised by work-related stress or address issues raised by mental ill health.
- Where allegations of harassment, bullying, or other misconduct require a disciplinary investigation or proceedings to take place.
- Where a member of staff presents an immediate danger to themselves or others.

14.4 In these circumstances, wherever possible, matters will be discussed with the member of staff concerned before any action is taken.

## **15 Protection for those reporting stress or assisting with an investigation**

15.1 Staff who report that they are suffering from work-related stress or mental ill health, who support a colleague in making such a report, or who participate in any investigation connected with this policy in good faith will be protected from any form of intimidation or victimisation.

15.2 If you feel you have been subjected to any such intimidation or victimisation, you should seek support from Central HR. You may also raise a complaint in accordance with our Grievance Procedure.

15.3 If, after investigation, you are found to have provided false information in bad faith, you will be subject to action under our Disciplinary Procedure.

## **16 Relationship with other policies**

16.1 This policy should be read in conjunction with other policies and procedures within this handbook.

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## **Schedule 14 Substance misuse policy**

### **1. About this policy**

- 1.1 We are committed to providing a safe, healthy and productive working environment. This includes ensuring that all staff are fit to carry out their jobs safely and effectively in an environment which is free from alcohol and drug misuse.
- 1.2 The purpose of this policy is to increase awareness of the effects of alcohol and drug misuse and its likely symptoms and to ensure that:
  - (a) All staff are aware of their responsibilities regarding alcohol and drug misuse and related problems.
  - (b) Staff who have an alcohol or drug-related problem are encouraged to seek help, in confidence, at an early stage.
  - (c) Staff who have an alcohol or drug-related problem affecting their work are dealt with sympathetically, fairly and consistently.
- 1.3 This policy is not intended to apply to "one-off" incidents or offences caused by alcohol or drug misuse at or outside work where there is no evidence of an ongoing problem, which may damage our reputation, and which are likely to be dealt with under our Disciplinary Procedure.
- 1.4 We will not accept staff arriving at work under the influence of alcohol or drugs, and/or whose ability to work is impaired in any way by reason of the consumption of alcohol or drugs, or who consume alcohol or take drugs (other than prescription or over the counter medication, as directed) on our premises.
- 1.5 This policy covers all employees, officers, consultants, contractors, volunteers, interns, casual workers and agency workers.
- 1.6 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Personnel responsible for this policy**

- 2.1 Our board of trustees (the board) has overall responsibility for the effective operation of this policy but has delegated day-to-day responsibility for overseeing its implementation to line managers.
- 2.2 All managers have a specific responsibility to operate within the boundaries of this policy, to ensure that all staff understand the standards of behaviour expected of them and to take action when behaviour falls below its requirements.

### **3. Identifying a problem**

- 3.1 If you notice a change in a colleague's pattern of behaviour you should encourage them to seek assistance through their manager. If they will not seek help themselves you should draw the matter to the attention of your manager. You should not attempt to cover up for a colleague whose work or behaviour is suffering as a result of an alcohol or drug-related problem.
- 3.2 If you believe that you have an alcohol or drug-related problem you should seek specialist advice and support as soon as possible.

### **4. Alcohol and drugs at work**

- 4.1 Alcohol and drugs can lead to reduced levels of attendance, reduced efficiency and performance, impaired judgement and decision making and increased health and safety risks for you and other people. Irresponsible behaviour or the commission of offences resulting from the use of alcohol or drugs may damage our reputation and, as a result, our business.
- 4.2 You are expected to arrive at work fit to carry out your job and to be able to perform your duties safely without any limitations due to the use or after effects of alcohol or drugs. In this policy drug use includes the use of controlled drugs, psychoactive (or mind-altering) substances formerly known as "legal highs", and the misuse of prescribed or over-the-counter medication.

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- 4.3 You should not drink alcohol during the normal working day, at lunchtime, at other official breaks and at official work-based meetings and events. Drinking alcohol while at work without authorisation or working under the influence of alcohol may be considered serious misconduct.
- 4.4 Managers should act to prevent excessive consumption of alcohol by any member of staff and should take steps to deal with any unacceptable conduct. Any such behaviour may lead to disciplinary action.
- 4.5 You must comply with drink-driving laws and drug-driving laws at all times. Conviction for drink-driving or drug-driving offence may harm our reputation and, if your job requires you to drive, you may be unable to continue to do your job. Committing a drink-driving or drug-driving offence while working for us or outside working hours may lead to action under our Disciplinary Procedure and could result in dismissal.
- 4.6 If you are prescribed medication you must seek advice from your GP or pharmacist about the possible effect on your ability to carry out your job and whether your duties should be modified or you should be temporarily reassigned to a different role. If so you must tell your line manager without delay.

## **5. Searches**

- 5.1 We reserve the right to conduct searches for alcohol or drugs on our premises, including, but not limited to, searches of lockers, filing cabinets and desks, bags, clothing, vehicles and packages.
- 5.2 Any alcohol or drugs found as a result of a search will be confiscated and action may be taken under our Disciplinary Procedure and the relevant authority informed.

## **6. Managing suspected substance misuse**

- 6.1 Where a manager considers that a deterioration in work performance and/or changes in patterns of behaviour may be due to alcohol or drug misuse they should seek advice and assistance from Occupational Health and/or Schools Choice HR service.
- 6.2 If your manager has reason to believe that you are suffering the effects of alcohol or drugs misuse, they will invite you to an investigatory interview. The purpose of the interview is to:
- (a) discuss the reason for the investigation and seek your views on, for example, the deterioration of your work performance and/or behaviour; and
  - (b) where appropriate, offer to refer you for medical and/or specialist advice.
- 6.3 If you arrive at work and a manager reasonably believes you are under the influence of alcohol or drugs, they shall immediately conduct an investigation.
- 6.4 Your line manager may ask for your consent to approach your GP or the Occupational Health Department/Schools Choice HR service for advice. A report will be sent to your manager who will then reassess the reasons for their investigatory meeting with you and decide on the way forward.
- 6.5 If, as the result of the meeting or investigation, your manager continues to believe that you are suffering the effects of alcohol or drugs misuse and you refuse an offer of referral to Schools Choice HR service, or an independent Occupational Health Advisor, appropriate treatment providers the matter may be dealt with under our Disciplinary Procedure.

## **7. Providing support**

- 7.1 Alcohol and drug-related problems may develop for a variety of reasons and over a considerable period of time. We are committed, in so far as possible, to treating these problems in a similar way to other health issues. We will provide support where possible with a view to a return to full duties. This may include:
- (a) Referral to appropriate treatment providers, where necessary in conjunction with your GP.
  - (b) Time off work to attend treatment and recognition of any periods of absence for such treatment as periods of sickness absence.

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- (c) Adjusting your duties or other support [as recommended by [the Occupational Health Department or] your GP or specialist during treatment and for an agreed period thereafter, subject to operational requirements and feasibility.

7.2 If you do not finish a programme of treatment, or your recovery and return to work does not go as planned, your manager will meet with you to decide what further action if any should be taken.

## **8. Confidentiality**

8.1 We aim to ensure that the confidentiality of any member of staff experiencing alcohol or drug-related problems is maintained appropriately. However, it needs to be recognised that, in supporting staff, some degree of information sharing is likely to be necessary.

## **9. Performance and disciplinary issues**

9.1 If you agree to undertake appropriate treatment and/or rehabilitation for an acknowledged alcohol or drug-related problem, we may decide to suspend any ongoing disciplinary action against you for related misconduct or poor performance, pending the outcome of the treatment.

9.2 Our intention is to support all staff with alcohol or drug-related problems to regain good health. Depending on the progress made on the course of treatment, any disciplinary action may be suspended for a specified period, discontinued or restarted at any time as we see fit.

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## **Schedule 15 IT and communications systems policy**

**Please also refer to our Online Safety Procedure found within the Safeguarding & Child Protection Policies published on the policies section of the Raedwald Trust website.**

### **1. About this policy**

- 1.1 Our IT and communications systems are intended to promote effective communication and working practices. This policy outlines the standards you must observe when using these systems, when we will monitor their use, and the action we will take if you breach these standards.
- 1.2 Breach of this policy may be dealt with under our Disciplinary Procedure and, in serious cases, may be treated as gross misconduct leading to summary dismissal.
- 1.3 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Equipment security and passwords**

- 2.1 You are responsible for the security of the equipment allocated to or used by you, and you must not allow it to be used by anyone other than in accordance with this policy. You should use passwords on all IT equipment, particularly items that you take out of the office. You should keep your passwords confidential.
- 2.2 You must only log on to our systems using your own username and password. You must not use another person's username and password or allow anyone else to log on using your username and password.
- 2.3 If you are away from your desk you should log out or lock your computer. You must log out and shut down your computer at the end of each working day.
- 2.4 At Raedwald Trust we use a high security password system to access emails and files. 2 step authentication is enabled for all staff accounts. This is either by text message or by the Microsoft Authenticator app. Many staff can use the mobile phone Raedwald Trust provides to accept the PIN code via text message or to use the authenticator app. Some staff are not provided with a work mobile phone due to the nature of their specific contract. In this case we expect staff to use their own personal mobile phone to receive the text message containing the PIN or to use the authenticator app. There are no additional costs incurred by staff using their own mobile phone. No confidential or work related data is sent via the text message.

### **3. Loan Equipment**

- 3.1 When staff are issued a new device (laptop, laptop charger, mobile phone, mobile phone charger) they must complete a Loan of Equipment Form.
- 3.2 All Trust property on loan to members of staff remains the property of the Trust. The Trust reserves the right to recall any such property for inspection, repair, testing or any other purpose deemed necessary.
- 3.3 On request all property must be returned immediately. If equipment is damaged whilst on loan, the full or partial costs of repair or replacement of that equipment may be charged to the borrower.
- 3.4 Trust property must not be used in any private enterprise, organization or business.
- 3.5 Trust property must not be used by any person or persons for personal gain or reward.
- 3.6 Persons leaving the employ of the Trust must return borrowed equipment immediately.
- 3.7 It is the responsibility of the staff borrowing equipment to inspect the equipment before it leaves the Trust, all or any defects, marks or flaws should be noted and reported at once and attached to the form.
- 3.8 All equipment returned must be inspected and should be in the same condition that it left the Trust. The cost of repairing any damage may be charged to the borrower.

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3.9 Staff borrowing equipment has a duty to ensure that Trust property is kept safe and secure at all times. It must not be left unattended in a vehicle.

3.10 Property must not be passed on to a third part under any circumstances, unless sanctioned by the Trust.

#### **4. Systems and data security**

4.1 You should not delete, destroy or modify existing systems, programs, information or data (except as authorised in the proper performance of your duties).

4.2 You must not download or install software from external sources without authorisation from your line manager. Downloading unauthorised software may interfere with our systems and may introduce viruses or other malware.

4.3 You must not attach any device or equipment including mobile phones, tablet computers or USB storage devices to our systems without authorisation from the CEO.

4.4 We monitor all e-mails passing through our system for viruses. You should exercise particular caution when opening unsolicited e-mails from unknown sources. If an e-mail looks suspicious do not reply to it, open any attachments or click any links in it.

4.5 Inform your line manager immediately if you suspect your computer may have a virus.

#### **5. E-mail**

5.1 Adopt a professional tone and observe appropriate etiquette when communicating with third parties by e-mail. You must comply with the published email signature.

5.2 Remember that e-mails can be used in legal proceedings and that even deleted e-mails may remain on the system and be capable of being retrieved.

5.3 You must not send abusive, obscene, discriminatory, racist, harassing, derogatory, defamatory, pornographic or otherwise inappropriate e-mails.

5.4 You should not:

- a. send or forward private e-mails at work
- b. send or forward chain mail, junk mail, cartoons, jokes or gossip;
- c. contribute to system congestion by sending trivial messages or unnecessarily copying or forwarding e-mails to others who do not have a real need to receive them; or
- d. send messages from another person's e-mail address (unless authorised) or under an assumed name;
- e. use a personal device to access Raedwald Trust emails.

5.5 Do not use your own personal e-mail account to send or receive e-mail for the purposes of our business. Only use the e-mail account we have provided for you.

5.6 Do not log into any personal accounts on your RT devices.

5.7 Do not log into any RT account on your personal devices.

#### **6. Using the internet**

6.1 Internet access is provided for business purposes and is filtered and monitored.

6.2 You should not access any web page or download any image or other file from the internet which could be regarded as illegal, offensive, in bad taste or immoral. Even web content that is legal in the UK may be in sufficient bad taste to fall within this prohibition. As a general rule, if any person (whether intended to view

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the page or not) might be offended by the contents of a page, or if the fact that our software has accessed the page or file might be a source of embarrassment if made public, then viewing it will be a breach of this policy.

6.3 We may block or restrict access to some websites at our discretion.

## **7. Monitoring**

7.1 Our systems enable us to monitor telephone, e-mail, voicemail, internet and other communications. For business reasons, and in order to carry out legal obligations in our role as an employer, your use of our systems including the telephone and computer systems (including any personal use) may be continually monitored by automated software or otherwise.

7.2 Our enhanced smoothwall filtering software monitors internet usage on Trust-issued devices both for on-site use and off-site use. This includes the monitoring of keystrokes on and off-site.

7.3 Raedwald Trust devices must only be used for work purposes. Inappropriate usage that violates the terms of this policy will be notified to the CEO and may result in disciplinary action pursuant to our staff disciplinary policy.

7.4 We reserve the right to retrieve the contents of e-mail messages or check internet usage (including pages visited and searches made) as reasonably necessary in the interests of the business, including for the following purposes (this list is not exhaustive):

- (a) to monitor whether the use of the e-mail system or the internet is legitimate and in accordance with this policy;
- (b) to find lost messages or to retrieve messages lost due to computer failure;
- (c) to assist in the investigation of alleged wrongdoing; or
- (d) to comply with any legal obligation.

7.5 Further information in regards to the storage, retention and processing of this data can be found in the Trust's staff privacy notice.

## **8. Prohibited use of our systems**

8.1 Misuse or excessive personal use of our telephone or e-mail system or inappropriate internet use will be dealt with under our Disciplinary Procedure. Misuse of the internet can in some cases be a criminal offence.

8.2 Creating, viewing, accessing, transmitting or downloading any of the following material will usually amount to gross misconduct (this list is not exhaustive):

- (a) pornographic material (that is, writing, pictures, films and video clips of a sexually explicit or arousing nature);
- (b) offensive, obscene, or criminal material or material which is liable to cause embarrassment to us or to our clients;
- (c) a false and defamatory statement about any person or organisation;
- (d) material which is discriminatory, offensive, derogatory or may cause embarrassment to others (including material which breaches our Equal Opportunities Policy or our Anti-harassment and Bullying Policy);
- (e) confidential information about us or any of our staff or clients (except as authorised in the proper performance of your duties);
- (f) unauthorised software;
- (g) any other statement which is likely to create any criminal or civil liability (for you or us); or
- (h) music or video files or other material in breach of copyright.

## **9. Mobile Device Management**

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- 9.1 We use Mobile Device Management (MDM) software to help us locate and remotely manage some of our Raedwald Trust devices, even when they are being used away from a Raedwald Trust site. For example, being used at a staff member's home or in the community, like a public library.
- 9.2 We apply the MDM to the following devices;
- Staff laptops
  - Staff RT mobile phones
  - RT iPads
- 9.3 The MDM software will be used to mitigate the loss of data by remotely wiping a device and securely destroying the data. Therefore, the MDM system benefits will include;
- Track and wipe lost devices
  - To identify a device OS system version remotely to check that it has the most recent and secure operation system
  - Supports the inventory
- 9.4 When and how we will use it
- When the device is on, the device cannot be tracked when it is off.
  - To track the location of a device that has been lost or stolen so it can be retrieved.
  - To remotely wipe a device that cannot be retrieved when we wish to delete data from the device.
  - We may use MDM to help identify the location of a member of staff e.g. lone working staff, when authorisation has been given by the CEO, CFO or Trust PA.
  - When directed by the police and through authorisation by the CEO, CFO or Trust PA.
- 10. Leavers**
- 10.1 All Raedwald Trust equipment will be remotely wiped at the end of your last day of employment.

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## Schedule 16 Social media policy

Please also refer to the RT Code of Conduct and the Online Safety Procedure found within the Safeguarding & Child Protection Policies published on the policies section of the Raedwald Trust website.

### 1. About this policy

- 1.1 This policy is in place to minimise the risks to our business through use of social media.
- 1.2 This policy deals with the use of all forms of social media, including Facebook, LinkedIn, Twitter, Google+, Wikipedia, Whisper, Instagram, Vine, Tumblr and all other social networking sites, internet postings and blogs. It applies to use of social media for business purposes as well as personal use that may affect our business in any way.
- 1.3 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### 2. Personal use of social media

- 2.1 Personal use of social media is never permitted during working hours or by means of our computers, networks and other IT resources and communications systems.

### 3. Prohibited use

- 3.1 You must avoid making any social media communications that could damage our business interests or reputation, even indirectly.
- 3.2 You must not use social media to defame or disparage us, our staff or any third party; to harass, bully or unlawfully discriminate against staff or third parties; to make false or misleading statements; or to impersonate colleagues or third parties.
- 3.3 You must not express opinions on our behalf via social media, unless expressly authorised to do so by your manager. You may be required to undergo training in order to obtain such authorisation.
- 3.4 You must not post comments about sensitive business-related topics, such as our performance, or do anything to jeopardise our trade secrets, confidential information and intellectual property. You must not include our logos or other trademarks in any social media posting or in your profile on any social media.
- 3.5 You are not permitted to add business contacts made during the course of your employment to personal social networking accounts.
- 3.6 Any misuse of social media should be reported to your line manager.

### 4. Guidelines for responsible use of social media

- 4.1 You should make it clear in social media postings, or in your personal profile, that you are speaking on your own behalf. Write in the first person and use a personal e-mail address.
- 4.2 Be respectful to others when making any statement on social media and be aware that you are personally responsible for all communications which will be published on the internet for anyone to see.
- 4.3 If you disclose your affiliation with us on your profile or in any social media postings, you must state that your views do not represent those of your employer (unless you have been authorised to speak on our behalf as set out in paragraph 3.3). You should also ensure that your profile and any content you post are consistent with the professional image you present to clients and colleagues.
- 4.4 If you are uncertain or concerned about the appropriateness of any statement or posting, refrain from posting it until you have discussed it with your manager.
- 4.5 If you see social media content that disparages or reflects poorly on us, you should contact your manager.

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**5. Breach of this policy**

- 5.1 Breach of this policy may result in disciplinary action up to and including dismissal. Any member of staff suspected of committing a breach of this policy will be required to co-operate with our investigation, which may involve handing over relevant passwords and login details.
- 5.2 You may be required to remove any social media content that we consider to constitute a breach of this policy. Failure to comply with such a request may in itself result in disciplinary action.

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## Schedule 17 **Redundancy policy**

### 1. **About this policy**

- 1.1 We will always try to avoid the need for compulsory redundancies but sometimes these may be necessary. The pattern or volume of our business or methods of working may change and requirements for employees may reduce.
- 1.2 The purpose of this policy is to ensure that, whenever reduction in employee numbers may become necessary:
- (a) we communicate clearly with all affected employees and ensure that they are treated fairly;
  - (b) we try to find ways of avoiding compulsory redundancies;
  - (c) we consult with employees [and with recognised trade unions **AND/OR** employee representatives]; and
  - (d) any selection for compulsory redundancy is undertaken fairly, reasonably and without discrimination.
- 1.3 This policy applies to all employees. It does not apply to agency workers, consultants or self-employed contractors.
- 1.4 This policy will be reviewed from time to time to ensure that it reflects our legal obligations and our business needs.
- 1.5 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### 2. **Avoiding compulsory redundancies**

- 2.1 Where we are proposing to make redundancies, we will enter into consultation with all affected employees on an individual basis and, where appropriate, also with recognised trade unions **AND/OR** employee representatives.
- 2.2 In the first instance we will consider steps that might, depending on the circumstances, be taken to avoid the need for compulsory redundancies. Examples of such steps include:
- (a) Reviewing the use of agency staff, self-employed contractors and consultants.
  - (b) Restricting recruitment in affected categories of employee and in those areas into which affected employees might be redeployed.
  - (c) Reducing overtime in affected departments to that needed to meet contractual commitments or provide essential services.
  - (d) Freezing salaries for a specified period.
  - (e) Considering the introduction of short-time working, layoff, job-sharing or other flexible working arrangements, where these are practicable.
  - (f) Identifying suitable alternative work that might be offered to potentially redundant employees.
  - (g) Inviting applications for early retirement or voluntary redundancy. In all cases the acceptance of a volunteer for redundancy will be a matter of our discretion and we reserve the right not to offer voluntary redundancy terms or to refuse an application where it is not in the interests of our business to do so.
- 2.3 Any measures adopted must not adversely affect our business and our ability to serve our customers.

### 3. **Making compulsory redundancies**

- 3.1 When it is not possible to avoid making compulsory redundancies, we will advise all affected employees and, where appropriate, recognised trade unions **AND/OR** employee representatives that compulsory redundancies cannot be avoided. We will consult recognised trade unions **AND/OR** employee representatives on the procedure that will then be followed and the criteria that will be applied.
- 3.2 In carrying out any redundancy exercise we will not discriminate directly or indirectly on grounds of gender, sexual orientation, marital or civil partner status, gender reassignment, race, colour, nationality, ethnic or

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national origin, religion or belief, disability or age. Part-time employees and those working under fixed-term contracts will not be treated differently to permanent, full-time comparators.

- 3.3 The criteria used to select those employees who will potentially be made redundant will be objective, transparent and fair and based on the skills required to meet our existing and anticipated business needs.
- 3.4 We will then consult individually with those employees who have been provisionally selected for redundancy.
- 3.5 Where selection for redundancy is confirmed, employees selected for redundancy will be given notice of termination of employment in accordance with their contracts and written confirmation of the payments that they will receive. Employees will be given the opportunity to appeal against this decision.
- 3.6 We will continue to look for alternative employment for redundant employees until their termination dates. The manner in which redundant employees will be invited to apply for and be interviewed for vacancies will be organised depending on the circumstances existing at the time. Alternative employment may be offered subject to a trial period where appropriate.
- 3.7 Employees under notice of redundancy will be entitled to take a reasonable amount of paid time off work to look for alternative employment or to arrange training for future employment.

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## **Schedule 18 Retirement policy**

### **1. About this policy**

- 1.1 We are proud to employ people of all ages and consider that age diversity is beneficial to the organisation. We are committed to not discriminating against employees because of age and adhere to the principles set out in our Equal Opportunities Policy.
- 1.2 We have no fixed retirement age. We acknowledge that retirement should be a matter of choice for individuals and will not pressurise employees into resigning because they have reached or are approaching a certain age. However, we will review whether a fixed retirement age may become necessary for particular roles from time to time.
- 1.3 This policy aims to create a framework for workplace discussions, enabling you to express your preferences and expectations with regard to retirement and enabling us to plan for our business.
- 1.4 This policy applies to all employees. It does not apply to agency workers, consultants or self-employed contractors.
- 1.5 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### **2. Personnel responsible for this policy**

- 2.1 Our board of trustees (the board) has overall responsibility for the effective operation of this policy but has delegated day-to-day responsibility for overseeing its implementation to line managers.
- 2.2 Managers have a specific responsibility to ensure the fair application of this policy and all members of staff are responsible for supporting colleagues and ensuring its success.

### **3. Discussing your future plans**

- 3.1 You or your manager may want to discuss your short, medium and long-term plans, as the need arises. For example, a promotion opportunity may arise, or, if your circumstances change, you may want a different working pattern or to stop work altogether. We need to plan for the business, and so may indicate to staff from time to time that it would be helpful to know what their plans are. There is no obligation for us or you to hold workplace discussions about your future plans, but it may be mutually beneficial to do so on an informal basis.
- 3.2 We will not make generalised assumptions that performance will decline with age, whether due to competence or health issues. If we think there are problems with your performance or ill-health, these will be dealt with in the usual way, through the Capability Procedure or Sickness Absence Policy.
- 3.3 During any workplace discussion:
  - (a) we will not assume that you want to retire just because you are approaching a certain age, such as state pension age; and
  - (b) we will not make discriminatory comments, suggesting that you should move on due to age.
- 3.4 Your employment or promotion prospects will not be prejudiced because you express an interest in retiring or changing work patterns.
- 3.5 If you indicate that you are thinking of retiring, you are free to change your mind at any time until you have actually given notice to terminate your employment.
- 3.6 If you express an interest in moving to a more flexible working pattern or changing role, we will confirm that this is what you want before any action is taken which could affect your employment, such as a change to your role or responsibilities. Alternatively, you may wish to make a request to change your working arrangements under our Flexible Working Policy.

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**4. Giving notice of retirement**

- 4.1 If you have decided to retire, we would appreciate as much notice as possible, although you should give at least as much notice as you are required to give under your contract of employment.

## Schedule 19 Trust vehicles

### 1. About this policy

- 1.1 This document outlines the Trust's policy regarding the provision and use of Trust vehicles.
- 1.2 This policy applies to all employees. It does not apply to agency workers, consultants or self-employed contractors.
- 1.3 This policy does not form part of any employee's contract of employment and we may amend it at any time.

### 2. Provision of Trust vehicles

- 2.1 Staff may be provided the use of a Trust vehicle such as a car or van in order that they may perform their duties.
- 2.2 The vehicle remains the property of the Trust at all times and must be returned at any time if requested by your line manager.

### 3. Requirements for driving Trust vehicles

To be insured on Trust vehicles staff must be over 25 and up to and including aged 70, staff must have held a driving license for at least 2 years and have less than 6 points. The table below shows the Trust vehicles and the license category required to drive.

| Make/Model                          | Registration | Number of Seats | Driving License Category |
|-------------------------------------|--------------|-----------------|--------------------------|
| Ford Galaxy Titanium                | AV64 UMG     | 7               | B                        |
| Ford Galaxy Ghia Tdci               | EJ57 ZVU     | 7               | B                        |
| Ford Transit 115                    | AX59 CNF     | 9               | B                        |
| Vauxhall Zafira Breeze CDTI         | EA09 PZC     | 7               | B                        |
| Vauxhall Zafira CDTI                | BG12 BFP     | 7               | B                        |
| Citroen Berlingo Multispace XTR HDI | DY64 VCC     | 5               | B                        |
| Vauxhall Zafira Exclusive           | AY63 WDT     | 7               | B                        |
| Ford S Max Titanium TDCI            | YS63 HXN     | 7               | B auto                   |
| Hyundai IX20                        | GD15 PKX     | 5               | B auto                   |
| Hyundai IX20                        | LR67 XMY     | 5               | B                        |

- 3.1 Only authorised personnel may drive Trust vehicles.
- 3.2 Unauthorised passengers must not be carried in Trust vehicles, nor must vehicles be used for personal gain or pleasure without the explicit permission of your line manager.
- 3.3 A vehicle is only available to employees who hold a current and valid driving licence. As all vehicles are insured through the Trust, any conviction for driving offences, any driving endorsements and any fines incurred whilst employees are in possession of the vehicle must be reported immediately.

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- 3.4 All employees required to drive a Trust vehicle will be required to produce their driving licence for examination or undergo a relevant check as often as requested by the Trust. Refusal to comply with this policy may lead to disciplinary action.
- 3.5 The appropriate documentation must be carried at all times e.g. driving licence.
- 3.6 Any fines incurred by the employee as a result of negligence on the employee's part must be paid for in full by the employee.
- 3.7 In the event of an employee being prosecuted or convicted of a driving offence which results in disqualification for any period and the holding of a licence is an essential requirement of the job, this will result in the employee's dismissal.
- 4. Care and appropriate use of Trust vehicles**
- 4.1 The vehicle is to be driven in a safe, courteous and economical manner at all times. Any employee who is considered to be acting recklessly in their use of the vehicle will be subject to disciplinary action (and this may involve the withdrawal of the vehicle where appropriate).
- 4.2 Smoking in Trust vehicles is a criminal offence, therefore any employee contravening this law may be liable to a fixed penalty fine and possible prosecution, and they will also be subject to disciplinary action.
- 4.3 Only Trust authorised stickers can be displayed on vehicles (including on windows and screens).
- 4.4 Employees in general must ensure that the vehicle is kept in good condition. This includes keeping it clean both inside and out and ensuring that the tyre pressures, lights, oil, water etc are kept up to the required standard.
- 4.5 Spot checks of vehicles may be carried out from time to time to ensure the vehicle is being kept clean and well maintained at all times. These checks will be conducted, without prior notice.
- 4.6 No vehicle is to be driven in an un-roadworthy condition. Any defects must be reported immediately. The vehicle must not be driven without the fault being rectified or prior approval given.
- 4.7 A driver of a Trust vehicle must avoid the consumption of alcohol or drugs prior to or during the course of driving. Infringement of this rule will result in the employee's dismissal.
- 4.8 No employee shall drive or be a passenger in any vehicle prior to, during or after working hours if the driver is, or can reasonably be believed to be, under the influence of alcohol or drugs.
- 4.9 All drivers should be thoroughly conversant with the Highway Code and relevant sections of the Road Traffic Act. All road signs and regulations are to be complied with.
- 4.10 When a Trust vehicle is parked at night, it is the driver's responsibility to ensure that any goods/equipment are left in a secure place overnight.
- 4.11 In the event of theft from a vehicle or a vehicle being stolen, this should be reported immediately. The Trust cannot be held responsible for the loss of or theft of personal belongings from a Trust vehicle.
- 4.12 To ensure compliance with legislation, all employees, whilst driving on Trust business, should switch off mobile telephones unless they can be used in an approved 'hands free' mode. For safety reasons, this procedure is also recommended in the use of personal mobile phones.
- 5. Accidents or damage to a Trust vehicle**
- 5.1 In the event of an accident you must exchange particulars with any other parties involved and obtain particulars of any Police Officer or witness present.

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- 5.2 Any and every accident or incident in which a Trust vehicle in an employee's charge becomes involved, regardless of fault and whatever persons or property are affected, must be reported immediately to the Trust.
- 5.3 Where any person suffers personal injury, the accident must be reported to the police as soon as is practicable. You must also obtain the particulars of the injured person(s).
- 5.4 In the event of the vehicle requiring any repair work, your line manager or the Trust will arrange the necessary repairs in liaison with the insurer. You must not authorise any repair work or liaise further with the insurer unless given explicit permission by your line manager.
- 6. Staff driving their own vehicles**
- 6.1 At the start of each academic year the following documents will be checked for all staff driving their own vehicles for business use;
- a) current insurance documents (to ensure business insurance is included)
  - b) current valid MOT
  - c) driving licence check on the Gov.UK website
- 6.2 All staff driving their own vehicles for business use must carry in their car a safety triangle, a hi-vis jacket and a basic first aid kit, all of which can be obtained from your Head of School.
- 6.3 If staff transport pupils in their own vehicle they must ensure they are familiar with the current risk assessment.
- 6.4 If staff receive points/fine/cautions on/to their licence following a traffic violation throughout the academic year they must immediately inform their Head Teacher whether on school business or personal.

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## Schedule 20 Personal Relationships Policy

### 1 Purpose

- 1.1 The aim of this policy is to provide guidance to staff on situations that may raise concerns in relation to conflicts of interest. A conflict of interest may impair objective and professional decision making, and lead to problems for both the employee and the employer.
- 1.2 The policy covers personal relationships at work including staff whose children attend the Raedwald Trust and those staff who undertake outside work with our pupils. This policy should be read in conjunction with our Code of Conduct, the Raedwald Trust Staff Charter and the Teachers' Standards.
- 1.3 The policy is intended to make clear to our staff the expectations the Trust has of them and what actions should be taken depending on the issue. If any employee is ever unsure what the expectations are in any given circumstance they should speak to their Head Teacher, leaders within the Trust should refer to the CEO.
- 1.4 Staff are required to disclose any potential conflicts of interest in relation to their personal relationships at work. Failure to comply with this policy may result in disciplinary action being taken.
- 1.5 This policy does not form part of any employee's contract of employment and it may be amended at any time.
- 1.6 A conflict of interest in this context is where a competing interest impairs an employee's ability to make an unbiased decision or act with impartiality, independence and integrity. For example, where an employee's personal relationship with another employee or parent/carer could or does conflict with the interests of the Trust, its pupils, other members of staff or anyone associated with the Trust. There is an expectation on staff to avoid being, or giving the appearance of being, in a position which may result in an actual or perceived detriment to the Trust's reputation and/or interests.

### 2 Scope

- 2.1 The policy applies to all staff regardless of length of service including those in their probationary period.
- 2.2 The policy does not cover relationships between staff and pupils which is set out in our Code of Conduct.
- 2.3 As recognisable figures in the local community the behaviour and conduct of staff, including behaviour that takes place outside of work can impact on employment. Therefore, conduct may be treated as a disciplinary matter if it is considered that it is relevant to the employee's employment (see the Raedwald Trust Disciplinary Policy).

### 3 Relationships between colleagues or other parties related to the Trust

- 3.1 The Raedwald Trust does not prohibit close personal or intimate relationships between colleagues. However it is important to ensure that there is no risk of a conflict of interest or abuse of power within the relationship whether that is real or perceived. It is important that personal and professional boundaries are maintained at work.
- 3.2 As a result, staff who are in a close personal or intimate relationship with a colleague, parent or carer, or any other person associated with the Trust must disclose this to the Head Teacher without delay. If the relationship is between a line manager/supervisor and a member of staff

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whom they line manage, the relationship should be declared to the Head, Trust CEO or Chair of Trustees. Staff in such relationships should at all times ensure that this does not affect their professional judgement or responsibilities at work in any way. Any member of staff involved in a close personal or intimate relationship with a colleague, parent or carer, or any other person associated with the Trust must not allow that relationship to influence their conduct whilst at work.

- 3.3 Where a member of staff has managerial authority over another member of staff with whom they are in a close personal or intimate relationship, the Trust reserves the right to transfer one or both members of staff to another role in the Trust following appropriate consultation with both members of staff in order to seek agreement to the transfer. The purpose of this transfer is to ensure appropriate line management structures are in place, particularly in relation to appraisal, pay progression decisions and matters relating to disciplinaries and grievances. If agreement can't be reached then the Trust reserves the right to make the change in order to safeguard the smooth running of the Trust and in the interests of protecting all parties.
- 3.4 Similar principles apply to a member of staff who begins a close personal relationship with a parent or carer of a pupil at the Trust. If the staff member's job role brings them into day to day contact with that pupil either as their teacher or as part of the staff member's supervision, monitoring, or pastoral duties, the Trust reserves the right to transfer them following consultation with them.
- 3.5 Whilst at work, those in a close personal or intimate relationship should ensure that they maintain appropriate physical and emotional distance, use professional communication and not pay undue attention to the other person, in comparison to other colleagues. Intimate behaviour during work time, for example kissing, touching or holding hands, is expressly prohibited. This rule applies during all working time, whether at School, Trust premises, on a school trip, or elsewhere. Any breach of this rule will be regarded as a disciplinary offence leading to disciplinary action.
- 3.6 If such a relationship comes to an end, both parties are expected to continue to conduct themselves in a professional way at work and ensure there is no disruption to the Trust.
- 3.7 Such actions are intended to minimise accusations of favouritism, unfair advantage, bias or undue control and to protect all parties from such accusations.
- 3.8 Abuse or misuse of a relationship is likely to invoke disciplinary action, which may lead to dismissal.

#### **4 Recruitment of family and friends**

- 4.1 Often the recruitment of individuals who may be family or friends of our staff can be a useful method of securing good recruits. The Trust therefore does not prohibit the recruitment of the family members and friends of existing staff. However staff will not be involved in the recruitment and safer recruitment processes regarding those family or friends.
- 4.2 If a family member or friend is appointed to a role under the line management of the relevant staff member, it may be appropriate, where possible, to put in place alternative line management structures to avoid any conflict of interest and the Trust reserves the right to do so.

#### **5 Confidential information obtained during the course of work**

- 5.1 Staff may have access to confidential information about students, colleagues or other matters relating to the Trust. This could include personal and sensitive data, for example information about a student's home life or a colleague's personal information. Staff should not disclose confidential information to anyone, this includes family or friends.
- 5.2 Staff should never use this information to their own personal advantage, or to humiliate, intimidate or embarrass others. Staff should never disclose this information unless this is in the proper circumstances and with the proper authority.
- 5.3 Staff are expected to demonstrate consistently high standards of personal and professional conduct in terms of handling personal data and information (including special category data) and maintain high standards of integrity in terms of the information that they have access to at work.
- 5.4 If an employee is ever in doubt about what information can or can't be disclosed they should speak to their Head Teacher.
- 5.5 Breach of any of the above confidentiality provisions is likely to invoke disciplinary action.

## **6 Staff whose children attend the school**

- 6.1 Staff may decide to send their own children to the academy where they work or they may start to work at the academy after their own children have already started at the academy. Where this happens arrangements will be put in place to ensure there are no difficulties for the staff member, their children, other pupils or other staff.
- 6.2 Whilst at school, the staff member's relationship with their own child should be in accordance with the normal rules that would apply with any other pupil. Therefore special treatment, physical contact, domestic conversations should be avoided. The staff member may need to explain this to their own child to ensure appropriate boundaries are maintained in school.
- 6.3 The staff member will not be involved in any behaviour management matters relating to their own child. The staff member should raise any concerns with their own line manager or a senior manager if they become aware of an issue at school; under no circumstances should the staff member deal with the matter themselves.
- 6.4 Where a staff member has any academic or pastoral concerns relating to their own child, where possible, the staff member's nominated contact should raise them using the normal channels of communication. If this is not possible, then the staff member should raise them with a senior leader. Any appointments between teacher and parent (who is a staff member) should be made in the normal way outside school working hours.
- 6.5 Where possible the Trust will not place the child in the staff member's own class, where they are a teacher or teaching support staff member. If this is not possible then additional protocols may be put in place to minimise conflicts of interest concerns and to protect the staff member from any accusations that may arise due to the close personal relationship.
- 6.6 Communication regarding the staff member's child should be carried out in the usual way (including via personal rather than Raedwald Trust email addresses) and the staff member should not in any circumstances use systems to search information about their own child without appropriate permission from their line manager or senior leader.
- 6.7 The Trust reserves the right to put in place additional protocols in place to ensure appropriate boundaries are maintained.

## **7 Undertaking paid or unpaid work with our pupils outside school hours**

- 7.1 Some staff members may take up paid or unpaid (voluntary) work outside school hours that involves our pupils for example tutoring work or care support funded by Direct Payments or sports coaching or activity clubs (for example scouts and guides) on a voluntary basis. Where this work is undertaken, it should be disclosed to the Trust at the earliest opportunity.
- 7.2 Staff undertaking work will be required to sign a declaration to ensure appropriate confidentiality and demarcation is in place (see Appendix 1).

## **8 Contractors and suppliers**

- 8.1 Staff must immediately declare any external relationships of a business or private nature with external contractors or suppliers or potential contractors and suppliers to the CEO
- 8.2 Staff who authorise, engage or supervise contractors or have any other official relationships with contractors with contractors and/or have previously had or currently have a business or private relationships with a contractor who is engaged or who is proposed to be engaged by the Trust, should declare that relationship to the CEO as soon as practicable.
- 8.3 When tendering, staff must declare any interest (and interest of their spouse, partner, family member, friend or associate), business or private relations or associations with any Raedwald Trust contractor or potential contractor.

## **9 Misuse of position**

- 9.1 All staff must maintain the highest standards of integrity in all relationships both inside and outside the Raedwald Trust.
- 9.2 Anyone working for the Raedwald Trust must not, either in their professional or personal capacity, use their position improperly to gain an advantage, or disadvantage any person or organisation.

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- 9.3 If a staff member is in a position to influence any decision which is taken by, or on behalf of, the Trust and they have any interest in that decision, however remote, they must declare it; this includes membership of voluntary bodies who could receive Raedwald Trust grants.
  - 9.4 No special favour may be shown to current or former colleagues or their partners, friends, relatives or associates when awarding contracts to private or other businesses run by them or who engage them in any capacity.
  - 9.5 Staff must ensure that they declare to the Head Teacher any personal interest which may impinge on their impartiality. Any arrangements which might, in the long term, prevent (or be seen to prevent) the effective operation of fair competition must be avoided.
  - 9.6 Staff must not lobby members of the Local Governing Body, Trustees or Members on individual or personal employment matters including those associated with recruitment of themselves or others.

## Declaration form for undertaking work with our pupils outside school

This declaration form sets out your obligation of ensuring confidentiality when undertaking work outside school as it relates to our pupils.

You are required to observe these obligations due to the link that this outside work has in relation to your work at the school. Your conduct outside work may therefore impact on your work at the Raedwald Trust.

You are required to sign this declaration form to confirm that you agree to the requirements set out therein.

As a staff member of Raedwald Trust you will have access to confidential information in the course of your duties about pupils, colleagues and other matters relating to the Trust. This could include personal and sensitive data (including special category data), for example information about a student's health and/or home life, support plans, education targets.

The Trust collects, holds, shares or otherwise uses data that is protected under the Data Protection Act 2018 (including the provisions of GDPR). As a staff member of Raedwald Trust you are expected to comply with the Trust's systems for collecting, storing and using/processing data as set out in the RT Data Protection Policy. Where you carry out external work outside the Trust (either paid or unpaid) involving our pupils, you will have specific obligations as set out below.

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### Confidentiality requirements of working in a school

Working at Raedwald Trust:

- 9.7 you are expected to demonstrate consistently high standards of personal and professional conduct in terms of handling personal data and information (including special category data)
- 9.8 you must maintain high standards of integrity in terms of the information you have access to at the Trust
  - you must not use information obtained in the course of your duties to your own personal advantage
  - you must not use information to intimidate, humiliate, or embarrass any pupil
- 9.9 you must not disclose information about our pupils unless this is in proper circumstances and with the proper authority
- 9.10 you must not disclose any confidential information about our pupils to any 3rd party without proper authority
- 9.11 you must not disclose information about your colleagues to any 3rd party, including those you provide services for outside of the Trust

This doesn't prevent you from sharing information in certain situations, for example when abuse is alleged or suspected, in line with your obligations under Keeping Children Safe in Education. In such cases, individuals have a duty to pass information on without delay to the appropriate authorities (see the Raedwald Trust Safeguarding and Child Protection Policy).

If you carry out external work (for example, tutoring or Direct Payments support work or voluntary work in the community), which involves our pupils in their own home or you have personal relationships with parents or carers outside of the Trust:

- 9.12 you must not disclose to either those pupils, their parents, family members or friends of pupils you care for, any information about our pupils which is gained as part of your work at Raedwald Trust
- 9.13 you must keep separate the work you do e.g. tutoring, volunteering from the work you do for Raedwald Trust

When undertaking outside work or volunteering with our pupils, if you are asked for any information by a pupil, parent, family member or friend about our pupils, including in an outside school setting, you should not make any comment in relation to the information gained through your work at Raedwald Trust. Even if this is a casual

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conversation, you should not provide confidential information that has been gained in the course of your duties at Raedwald Trust.

You should be aware that any breach of confidentiality is considered a serious matter and may be dealt with under the disciplinary policy, which may result in dismissal.

If you are ever in doubt about what information that can or can't be disclosed, you should speak to your Head Teacher at the Raedwald Trust.

Please sign and return a copy of this document to the Trust PA by confirming the following:

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Name:

Date:

I confirm that I have read and understood the terms of this confidentiality document.

I confirm that I accept the terms of this confidentiality document and I understand the implications of any breach of confidentiality.

Signed: \_\_\_\_\_

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## Schedule 21 Visitors Safe and Responsible Internet Use

Visitors are welcome to use our Guest internet provision for **professional activities** as long as the following rules are adhered to:

Visitors will not create, access, copy, store, transmit or publish any material which may contravene any law. This includes but is not limited to offensive material, copyright material, threatening or obscene material, pornographic material or material protected by trade secret.

The Leadership team at Raedwald Trust have the authority judge any material that they deem offensive as offensive material under the terms of this agreement.

Visitors confirm that their device is free from viruses or malware and has anti-virus installed and running on their device whilst they use the Guest internet provision.

For your information:

- We keep a record of internet sites you visit for legal reasons
- In certain circumstances we will give records on internet use to organisations outside the Raedwald Trust e.g. the Police in accordance with our Data protection policy
- We reserve the right to suspend or cancel your use of our internet and ICT in certain circumstances and without reason or notice.

By continuing to use our facilities we take it that you understand the above.

### User signature

- I understand this policy.
- I agree to abide by the Raedwald Trust acceptable internet use policy. The internet is filtered, however, I understand that no filtering can be 100% accurate.
- I agree to abide by the rules of this acceptable use policy. Please ask to read our eSafety Policy, Data protection policy for further information and guidance.

|   |  |
|---|--|
| Full Name (printed)                                   |  |
| Job title   |  |
| Signature   |  |
| Date  |  |
| Reason for needing internet (use reverse if required) |  |
| Authorisers name and date                             |  |

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## Schedule 22 You Tube Statement

The Smoothwall filtering system was integrated into all RT schools in August 2019. This system changes the way filtering has been previously applied. This update to the policy describes the changes and the impact of these changes.

**The system allows for different students and staff filtering rules to be set. In relation to Youtube, the following approach has been adopted.**

In **all schools** Youtube is available to students, but is restricted to strictly filter the content. This means that educational videos about contemporary issues such as knife crime, drug use and sex and relationship education will be restricted.

In **some schools** Youtube is available to staff in a moderately filtered state. This means that some content relating to educational videos about contemporary issues such as knife crime, drug use and sex and relationship education will **not be restricted**. Extreme and illegal content **will be** filtered for staff users as it is for student users.

### Practical approaches to restricted Youtube content

Where a staff member wishes students to view a Youtube video that is restricted for students, they can follow the approach:

Is a similar of better video available through Discovery Education? If so, use this.

Check comments under the Youtube video to review topics people are discussing in relation to this video.

Check with the Safeguarding and School leadership team that the video is indeed suitable for the young person/people.

Agree to the safest approach from the following options, A and B.

#### Option A

Plan ahead and know what videos you will be showing before the lesson.

Show the video to the students via a screen / whiteboard etc... so you as the staff member remain in control of the content viewed through your staff web filtering rules.

Where you wish to show a video found in an impromptu (part) way during the lesson, you must thoroughly review the video before sharing with the students.

Never search for videos using your teachers filtering account, whilst sharing your screen (through a projector or whiteboard) as you cannot control the content which is returned in the search.

Considerations:

What suggested videos will show up at the end of the video, will the content be appropriate?

Consider embedding within a Google Slides file that will show a black screen at the end of the video when viewed through a Google Slides presentation (Office 365 does not currently offer this option).

#### Option B

Plan ahead and know what videos you will be showing before the lesson.

Request that a specific Youtube video is unblocked at your school site for students (you do this via your Admin/Business team and Leadership team - you cannot request filtering changes directly to the IT support team (Total Solutions)).

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Check that the student accounts can view the video prior to the lesson.

Consider removing this change after the lesson and reverting to the standard filtering setting.

**A reminder of filtering limitations**

No internet filtering is 100% accurate and there can be times where some content is restricted - that should not be restricted (ie. the filtering is set to be too highly sensitive) in addition, the opposing scenario is possible. Therefore it is imperative that young people sign the acceptable use policy and are regularly reminded of their responsibilities. Staff must follow the online safety and Safeguarding guidelines according to the policy at all times.

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### **Schedule 23 Financial Support for CPD**

The underlying principal at the Raedwald Trust is that CPD, when allowed and in line with the Performance Management processes and the Trust or Academy Improvement Plan, will be funded from the trust's allocated CPD budget. However, in certain circumstances, there may need to be deviations from this general principal. Each request for CPD will be assessed on its own merit and financial implications will be considered by the Trust Board where necessary. In certain circumstances, there may need to be a request for CPD that the trust or academy decides cannot be entirely funded. In these cases, the decision will be based on the following principles:

- Does the CPD meet the needs of the academy or trust, as indicated by the AIP?
- Is the CPD in line with the member of staff's professional development modules?
- Is the cost best value?
- Without adversely impacting the operational needs in the Trust.

In the event where a member of staff wishes to undertake CPD that cannot be funded by the academy or trust, every effort will be made to support the CPD, providing it meets the above criteria. In this case, the following adjustments may be considered:

1. Part-funding. Where the cost of requested CPD is beyond the fair allocation of the budget, the opportunity for part-funding will be considered.
2. Adjustments to working conditions (e.g. adjusting timetable to enable the course to be completed in school time).
3. Interest-free loan taken from payroll deductions to enable the member of staff to undertake CPD.

It is possible that, in certain circumstances, a combination of the above is agreed to. Where the course could conceivably lead to the member of staff leaving for another job following acquisition of the training, an agreement that any funding provided to facilitate the training (including full or part-funding & loaning funds) will be repaid to the school in full will be required, with a cut off (e.g. 2 years after completion).

**Please refer to the Repayment of Training Funds Policy (available on the Raedwald Trust website).**

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**Schedule 24 Confidentiality/resources created during employment**

You agree and acknowledge that all written, spoken and electronic information held, used or transmitted by or on behalf of the Employer, in whatever media, including information and data held on computer systems, hand-held devices, tablets or other portable or electronic devices and telephones and paper records, and information transmitted orally, relating both to the Employer's own education provision or any pupils, clients, suppliers and other third parties with whom the Employer engages or provides educational provision for, remains the Employer's property at all times, no matter what format it is in, where it is stored or how it is accessed.

Both during the period of your employment and thereafter, you shall not disclose to any person or make use of for your own benefit or for the benefit of any other person, any trade secret or confidential information of the Employer unless you have obtained the written consent of the Trust Board or such use or disclosure is required for the proper performance of your duties.

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## Schedule 25 Organisational Change Management Policy & Procedure

### 1. Introduction

- 1.1 This policy sets out Raedwald Trust's approach on managing organisational change within the Trust to improve organisational effectiveness, including potential redundancy situations. Where redundancies are proposed the number of employees involved will determine how the process will be managed.
- 1.2 This policy has been agreed following consultation with the recognised trade unions. It has been formally adopted by the Trust Board.
- 1.3 This policy does not form part of any employee's contract of employment and may be amended at any time.

### 4. Scope and purpose of this policy

- 4.1 It is recognised that certain changes (for example, a fall in roll, curriculum changes, budget cuts and restraints and outsourcing functions) may make it necessary to consider a restructure and reorganisation of staffing that may include a change in job roles, reporting lines, operational set up, changes to terms and conditions and redundancies. The purpose of this policy is to have a clear framework in place that sets out what we will do whenever significant change within the Trust, including a reorganisation of staff and/or a reduction in employee numbers, may become necessary.
- 4.2 We will consider ways to avoid compulsory redundancy if possible, and where we are unable to avoid reducing employee numbers, we will try to minimise the effect of redundancies through the steps set out in this policy. In doing so, we will not discriminate directly or indirectly on the grounds of any protected characteristic or against part-time or fixed-term employees.

The legal definition of redundancy is as follows:

An employee who is dismissed shall be taken to be dismissed by reason of redundancy if the dismissal is wholly or mainly attributable to:

- (a) the fact that the employer has ceased or intends to cease the business for the purposes of which the employee was employed, or to carry on that business in the place where the employee was so employed; or
- (b) the fact that the requirements of that business for employees to carry out work of a particular kind, or for employees to carry out work of a particular kind in the place where the employee was employed by the employer, have ceased or diminished or are expected to cease or diminish.

- 4.3 As part of the application of this policy, the Raedwald Trust will collect, process and store personal data in accordance with our data protection policy. We will comply with the requirements of Data Protection Legislation (being the UK General Data Protection Regulation and Data Protection Act 2018) and any implementing laws, regulations and secondary legislation, as amended or updated from time to time, in relation to how we collect, hold and share this personal data. We will provide workforce data in line with our Privacy Notices which sets out how we will gather, process and hold personal data of individuals during employment.

### 5. Planning

- 5.1 The Trust Board will ensure that there is effective planning, financial management and resource allocation in place in the day-to-day and strategic management of the Raedwald Trust. We will carry out workforce planning and regularly review our staffing structure to ensure it is fit for purpose, supports teaching and learning and to minimise surplus staff situations.
- 5.2 Our leadership team will provide information in relation to workforce planning and resources to our Trust Board as required.

### 6. Consultation

- 6.1 Where the changes proposed could result in redundancies and/or changes to terms and conditions, we will enter into meaningful consultation to provide the opportunity for all those concerned to discuss the problem and consider options or alternative ways of tackling the problem. Consultation should begin in good time and will be in accordance with statutory requirements for collective consultation where applicable. Where

the statutory requirements to collectively consult do not apply, we will determine a reasonable, meaningful consultation period is carried out based on the proposals.

- 6.2 We will consult with all affected employees on an individual basis in respect of their own individual circumstances.
- 6.3 We will also consult with representatives of our recognised trade unions or elected employee representatives irrespective of the number of employees at risk of redundancy and regardless of the changes to terms and conditions proposed.
- 6.4 Where appropriate and in accordance with clause/paragraph 12.3, we will provide the recognised trade unions or elected employee representatives (or affected employees if, after being invited to elect employee representatives, the affected employees fail to do so within a reasonable period of time) with sufficient information in writing, including:
- (a) The reasons for the proposals;
  - (b) The numbers and descriptions of employees it proposes to dismiss as redundant or who are at risk of redundancy;
  - (c) The total numbers of employees of that description employed at the establishment in question;
  - (d) The proposed method of selecting the employees who may be dismissed;
  - (e) The proposed method of carrying out the dismissals, including the period over which the dismissals are to take effect;
  - (f) The numbers of agency staff at the Raedwald Trust the areas that they are deployed in and the type of work they are undertaking;
  - (g) Any proposals with regard to changes in job roles, reporting lines, operational changes or structure; and
  - (h) A timeline detailing each stage of the process .
- 6.5 We will consult on ways that we could avoid or reduce the need to make compulsory redundancies, if that is possible, or to mitigate the consequence of any dismissals. Examples of such steps include:
- (a) Reviewing the use of agency staff;
  - (b) Restricting recruitment or a vacancy freeze in affected categories of employees and in those areas into which affected employees might be redeployed;
  - (c) Natural wastage;
  - (d) Retraining and/or redeployment within and across the Raedwald Trust;
  - (e) Reducing overtime/additional hours;
  - (f) Offering reduced working time including job-sharing or other flexible working arrangements, and career breaks, where these are practicable;
  - (g) Inviting applications for early retirement or voluntary redundancy. In all cases the decision to release an employee under such schemes will be at the absolute discretion of the Raedwald Trust;
  - (h) Consideration of different working practices and working patterns; and
  - (i) Freezing or reducing salaries.
  - (j) Layoffs – suspending work for a temporary period.
- 6.6 Where teaching posts are at risk of redundancy sufficient time will be given for consultation and for teachers' notice periods to expire before the proposed implementation date. To implement at the beginning of the following term notice must be given by the end of October, February or May.
- 6.7 Any measures we adopt will not adversely affect the Raedwald Trust and the quality of teaching and learning provided to our pupils.
- 6.8 Employees and, where appropriate, trade unions or elected representatives, will be advised of the arrangements for them to respond to the proposals. When issues are raised during the consultation period they will need to be actively considered and responded to with an explanation for the nature of the response given within a reasonable time frame and as appropriate. A final response will be given at the end of consultation.
- 6.9 Employees who are absent from work due to maternity/paternity/adoption leave, long term sickness or secondment but whose substantive post is affected by the proposals will be included in any consultation process. If face to face meetings are not possible, we will conduct the consultation process remotely.

6.10 If the proposals include changing terms and conditions, then we will ensure that through consultation it is made clear to employees what the changes and how they may affect them.

## 7. Selection

7.1 In order to identify how many roles are potentially redundant, we will create a pool of employees from which those who are to be made redundant will be selected. The selection pool will normally consist of employees who carry out the same or similar work and perform jobs that are interchangeable. Selection pools are not necessary when redundancies are expected to involve the whole Trust or just one specific role.

7.2 Where a process of selection is required to either identify which employees within a pool are at risk of redundancy, or for application for alternative posts the criteria used to select will be objective, measurable, robust, transparent, non-discriminatory and fair, and based on the skills required to meet our existing and anticipated Raedwald Trust needs. We will consider the most appropriate method of selection in relation to the circumstances surrounding the specific restructuring and/or redundancy situation and the proposed selection criteria will be consulted on during the consultation process. In a redundancy situation where there are the same number of incumbents as there are roles proposed to be reduced, then the selection criteria will be on the basis that they occupy that role.

7.3 Employees on secondment or 'acting up' will be deemed to be in their substantive post for the purposes of any change process.

7.4 Individual employees who are provisionally selected for redundancy following the application of the selection criteria will be informed and (where appropriate) invited to a meeting at which they will be given an opportunity to make representations that the application of the criteria is unfair or has been applied incorrectly as part of the consultation process. Note that under the Protection from Redundancy (Pregnancy and Family Leave) Act 2023 employers will be required to offer pregnant women and new parents returning from family leave a suitable alternative vacancy if possible.

## 8. Making compulsory redundancies

8.1 Every effort will be made to mitigate job losses where possible. When it is not possible to avoid making compulsory redundancies, employees who remain at risk of redundancy will be invited to a compulsory redundancy hearing to consider redundancy.

8.2 Where selection for redundancy is confirmed, employees selected for redundancy will be given notice of termination of employment in accordance with their contract of employment or minimum statutory notice period (whichever is greater) and written confirmation of the payments (and how it has been calculated) that they will receive (where applicable).

8.3 Employees will be given the opportunity to appeal against this decision. Details of the appeals process will be provided to the employees in writing following the decision being made.

8.4 Depending on the circumstances, the Raedwald Trust may waive its right to insist on employees working their notice and instead give a payment in lieu of notice.

8.5 Protection from redundancy applies to certain employees. We will offer suitable alternative employment (where available) in the following circumstances:

| Circumstances                                   | Length of protection   |
|---|--|
| <b>Pregnant employee taking maternity leave</b> | <b>Start:</b> When the employer has been notified of pregnancy<br><b>End:</b> 18 months from the child's date of birth if notified to employer before the end of maternity leave (or 18 months from the Expected Week of Childbirth if not notified)<br>(Includes any time spent in this period on maternity leave or other statutory leave) |
| <b>Employee has suffered a miscarriage</b>      | <b>Start:</b> When the employer has been notified of pregnancy<br><b>End:</b> Two weeks after the end of the pregnancy, for pregnancies ending before 24 weeks.<br><b>Note:</b> Pregnancies ending after 24 weeks are classed as stillbirths and the employee would be entitled to statutory maternity leave (see above).                    |

|  |   |
|--|---|
| <b>Employee taking adoption leave</b>        | <p><b>Start:</b> Beginning of adoption leave</p> <p><b>End:</b> 18 months from date of placement or date of entry into Great Britain (if overseas adoption).</p> <p>(Includes any time spent in this period on adoption leave or other statutory leave)</p>   |
| <b>Employee taking shared parental leave</b> | <p><b>Note:</b> If the employee has also taken maternity or adoption leave, the above periods apply instead.</p> <p><b>Start:</b> Beginning of SPL</p> <p><b>End:</b> If less than six weeks of SPL is taken, at the end of SPL. If more than six continuous weeks of SPL is taken, 18 months from child's date of birth (inclusive of any time spent on statutory leave) or the date the child enters Great Britain if adopting from overseas.</p> |

## 9. Pay protection

In circumstances where teaching staff are offered a role with less responsibility or requirement of a TLR they will receive safeguarding protection for the TLR payment for a period of three years. Safeguarding provisions for teachers are set out in the School Teachers' Pay and Conditions Document.

## 10. Support mechanisms

### Alternative work/retraining

- 10.1 We will make every effort to redeploy any employee who is selected for redundancy and inform them of any vacancies that we have ring-fenced in the proposed structure or elsewhere in the Trust and can offer as a redeployment opportunity up until their termination date. We will provide details of the application process, when applicable, and will ensure the selection of candidates for redeployment opportunities and alternative posts are conducted fairly.
- 10.2 The manner in which redundant employees will be invited to apply for and be interviewed for vacancies will be organised depending on the circumstances existing at the time. While priority will be given wherever possible to employees under threat of redundancy, the Raedwald Trust reserves the right to select the best available candidate in relation to any given vacancy. Employees selected for redundancy whilst pregnant, on maternity, adoption leave or Shared Parental Leave have a separate legal entitlement to be offered any suitable alternative post in preference to other employees who have been selected for redundancy.
- 10.3 An individual who is redeployed into a suitable, alternative post is entitled to a trial period of four weeks in the new job. This may be extended by mutual agreement for training purposes. If the redeployment opportunity is found to be unsuitable by either party following the trial, employment may be terminated on grounds of redundancy on the original terms, dependant on the reasons for refusal.
- 10.4 An employee will not be entitled to a redundancy payment if he or she unreasonably refuses an offer of suitable alternative employment. In this situation, the employee's contract would still be terminated by reason of redundancy but no redundancy payment will be made.
- 10.5 The Trust will consider if any form of re-training can be provided in order to assist employees at risk of redundancy to gain employment within the Trust.

### Counselling service

- 10.6 Any employees who are at risk of redundancy or who have been issued a notice of redundancy or involved in a restructuring process will be able to access the Raedwald Trust's confidential counselling helpline. The contact details are as follows:
- Education Support EAP  
08000 856 148  
educationsupport.org.uk

### Time off

- 10.7 An employee under notice of redundancy with at least two years' service will be entitled to a reasonable amount of paid time off to look for alternative work, attend interviews, or to undertake training. Employees

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wishing to take advantage of this right should make the appropriate arrangements with their line manager and provide proof of attendance if requested to do so.

## 11. Redundancy payments

11.1 Employees with two or more years' service will be entitled to a **statutory** redundancy payment. The period of continuous service will be calculated with reference to the Employment Rights Act and the Redundancy Modification Order. **The Raedwald Trust's** redundancy payments are calculated using the following formula:

- Half a week's pay for each full year you were under 22
- One week's pay for each full year you were 22 or older, but under 41
- One and half week's pay for each full year you were 41 or older

Length of service is capped at 20 years.

Your weekly pay is the average you earned per week over the 12 weeks before the day you got your redundancy notice.

11.2 The amount of this payment will be confirmed when the employee is selected for redundancy and the sum will be paid along with the employee's final salary payment or payment in lieu of notice.

## 12. Embedding the Change

Carrying out the implementation successfully does not in itself guarantee the success within the new structure. The CEO will therefore need to give consideration to the following:

- Any updating or retraining needs;
- **Team building;**
- Induction into new working practices, systems or procedures;
- Changes to the configuration of the School/Academy/Trusts meeting structures and methods of communication;
- Changes to appraisal arrangements;
- Notifying other employees and stakeholders such as parents of the changes that may affect them.

## Schedule 26 Staff Wellbeing Policy

### 1. Rationale

At Raedwald Trust we recognise that our staff are our most important resource and are valued, supported and encouraged to develop personally and professionally within a caring, purposeful learning community.

We recognise that there is a direct correlation between the wellbeing of our staff and the wellbeing of our pupils,

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and that the culture and ethos of a school are determined by the extent to which staff work towards a shared vision.

We believe that it is essential that all staff feel part of a valued team, have the opportunity to express their views and are supported to manage their workload within a culture that supports a healthy work-life balance.

This purpose of this policy is to ensure that we embrace the many school practices that support staff health and wellbeing, to minimise the harmful effects of stress and ensure that there is cohesion in working towards health and wellbeing for all staff. It outlines some of the ways in which we commit to maintaining staff wellbeing and it recognises that each individual member of staff and their circumstances are different but provides an overview of the basis on which everyone can contribute, and expect to be treated.

## **2. Aims**

We aim to ensure that our Trust:

- supports staff mental health and wellbeing
- minimises stress
- helps staff to keep a healthy work-life balance
- helps staff to manage their family and work responsibilities
- ensures staff feel valued
- recognises and promotes the importance of a happy team
- involves staff in decision making
- takes account of equality implications

## **3. Roles and responsibilities**

The leadership team, Trust Board and Trust staff will work towards an ethos where everyone is valued, where respect, empathy and honesty are the cornerstones of all Trust relationships and where health and wellbeing are held central to Trust practice. We expect all staff to show respect and empathy for each other, and to treat confidential information sensitively and according to Trust policy.

**The Trust Board are accountable for the following and delegate this responsibility to the Trust Leadership team:**

- fulfilling its duty of care as an employer
- monitoring the workload of the CEO
- receiving any concerns from members of staff
- ensuring that the resources are in place to keep staff workload at healthy levels
- reviewing this policy in conjunction with the CEO
- considering how its own members are treated and valued
- ensuring that demands are not placed on individual members of staff that interfere unfairly with their work-life balance
- operating a sensitive performance management policy
- ensuring that other Trust policies and procedures take account of staff wellbeing
- overseeing that change management is operated in a fair and reasonable way.

**The CEO is responsible for:**

- providing personal and professional development such as team building, management of change, stress management, assertiveness, communication
- providing a non-judgemental and confidential support system such as coaching, mentoring and pastoral support for staff
- monitoring the workload of members of staff and being alert to signs of stress
- listening to the views of members of staff and providing a range of strategies for involving staff in school decision making processes
- ensuring that the efforts and successes of staff are acknowledged and celebrated
- acting as gatekeeper and prioritising reforms and innovations

- ensuring that staff are equipped with the right training to do the job confidently
- ensuring that staff feel valued and that time is set aside for them
- providing meeting guidelines that are agreed upon and followed
- planning the year's timetable considerably bearing in mind staff commitments
- providing a set budget for staff facilities, environment and welfare
- including in professional development meetings opportunity for staff to discuss their aspirations and career intentions
- making special arrangements, where possible, to enable staff to combine the demands of family life and work life
- recognising that staff may have experiences in their personal lives that may make them vulnerable to pressures at work, and which may have a temporary influence on their work performance e.g. health issues, bereavement or loss, or personal circumstances
- ensuring accessibility and the accessibility of SLT to members of staff
- ensuring that there are effective methods of communication
- ensuring support services are made available or signposted on behalf of members of staff where additional specialist support is needed
- maintaining contact with staff during long absences
- ensuring that a mentor system operates within the Trust and especially for each new members of staff and that the staff induction process is put into place
- conducting risk assessments for work-related stress
- relevant time protected for staff such as PPA, staff meeting time for reports etc.

The CEO implements these responsibilities with the support of appropriate staff such as the Head Teacher and Central Leadership who all strive to be positive role models through their own practice.

**Members of staff are responsible for:**

- treating one another with empathy, respect and kindness
- taking care of their own health and safety at work and communicating with key staff where they need support
- being committed to the ethos of staff wellbeing and keeping in mind the workload and wellbeing of colleagues
- valuing all members of staff in the school and acknowledging the important role that everyone takes
- contributing to the ethos and social aspects of school life where possible to build morale and effective team spirit
- developing and respecting shared areas where possible so that there is space to relax as well as appropriate work spaces.

**Examples of good practice may include:**

- providing lunch and refreshments in Inset training
- carrying out team-building exercises as part of staff CPD
- giving staff the option to plan their own social activities
- holding designated health and wellbeing days
- celebrating staff achievements
- providing pastoral services – drop-ins and confidential sessions
- creative spaces for staff to be able to meet, relax and work quietly
- making refreshments available to staff
- providing creative opportunities for building morale and promoting wellbeing (e.g. croissant mornings, cake/fruit days, shared lunches).

**4. Support in specific circumstances**

The Trust will provide support and discuss options as appropriate to specific circumstances. In some cases, it may be necessary to seek external services but the Trust will continue to support even when external services are involved.

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Staff are encouraged to arrange medical appointments outside of school hours. Where this is not possible, support will be given on an individual basis.

Where possible, staff are supported with their work-life balance and wellbeing outside of work. This could be through providing staff with paid leave for special events and celebrations, or time off to deal with specific family circumstances or crisis.

## **Schedule 27 Agile Working Policy**

### **1. Policy Statement, Aims and Objectives**

1.1 Raedwald is committed to adopting agile working practices and recognises the benefits in empowering employees to work agilely, where appropriate in the context of 'business' needs.

1.2 Agile working is the term used to describe how employees can work flexibly from any location

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and/or at different times. It is about utilising technology to change working practices and work differently. Agile working seeks to find the most appropriate and effective ways of working to carry out a particular task. It is working within the boundaries of the task but without the boundaries of how to carry out the task.

1.3 The aim of this policy is to set out the principles and practical guidance in relation to agile working for staff employed by Raedwald Trust. The policy does not negate or supersede Raedwald's Flexible Working policy that already exists for use in individual circumstances by all employees.

1.4 It is accepted that not all roles or employees will be suitable for agile working. Some roles are intrinsically not suitable for agile working and some proposed arrangements may not be considered safe or secure: it is considered that majority of roles at the Raedwald Trust will not be suitable for agile working. Raedwald will consider each situation on its own merits, applying the principles of fairness and consistency whilst ensuring that overriding 'business' needs and other requirements can be appropriately met.

## **2 Scope**

2.1 This policy applies to those members of staff that are directly employed by Raedwald and for whom Raedwald has legal responsibility. It does not apply to contractors, agency staff or volunteers.

## **3 Accountabilities and Responsibilities**

3.1 Overall accountability for the health and wellbeing of Raedwald employees is outlined in the Health & Safety Policy. Employees assume responsibility to apply the Raedwald Trust Lone Working Procedures in the event that this is necessary during agile working hours.

## **4 Equality**

4.1 Raedwald is committed to preventing discrimination, valuing diversity and achieving equality of opportunity. No employee will receive less favourable treatment on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation, or on the grounds of trade union membership'. Raedwald Trust's Equality, Diversity & Inclusion Policy underpins our commitment to equality in this and all regards.

## **5 Eligibility and Exclusions**

5.1 Most roles within the Raedwald Trust will not be suitable for agile working, in full or in part. The CEO holds the responsibility to consider requests and will only decline where the needs of the business dictate that the role is not suitable for agile working. The exception to this may be where an employee is working under a specific purpose risk assessment agreed by the CEO or the Trust Business Manager.

5.2 Agile working is not a substitute for flexible working, nor is it a contractual rights or permanent arrangement. In instances where an employee requires regular flexible working patterns at specific times for personal reasons the Raedwald Trust Flexible Working Policy should be considered.

## **6 Process for Agile Working**

6.1 Raedwald intends to implement agile working to staff groups where this is practicable. A template setting out the proposed agile working is included in Appendix 2. In exceptional circumstances, Raedwald may make a request for their teams to work agilely.

6.2 If agreed, Raedwald will:

- Confirm agreement to the principle of agile working to the employee in writing, ensuring this confirmation is recorded on the employees' personal file
- Confirm any particulars of the agreement, for example, in relation to management supervision and communication, or other specific arrangements, for example attendance at meetings and

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contact with team members

- Confirm working times for hours that are allocated at different times
- Ensure all the specific expectations of the arrangement are clear to the employee, including the delivery of objectives; completion of contracted hours; and prescribed hours that can be taken agilely.
- Regularly review the agile working arrangement and update where necessary. Review periods will be confirmed once agreement is in place.

6.3 Raedwald employees are required to adhere to the Raedwald Trust procedures for absence: these procedures apply to hours worked agilely. This means that employees with agreed agile hours are required to record all absence, including LoA, medical and other appointments, on EduPay in the usual way.

6.4 Any agreement to work agilely will not constitute a change to an employee's base unless they will work from an alternative location to a Raedwald Trust location on a permanent basis agreed confirmed in the employee's contract.

## **7 Key Factors to Consider when Working Agilely**

### **7.1 Communication**

It is important in an agile working environment that communication is effective. The use of Microsoft Teams will help to keep lines of communication open and prevent employees from feeling detached from their line manager and team colleagues, as well as providing a platform for more formal meetings. Whilst these options reduce the number of face-to-face meetings it is important that some time is built in to enable some meetings in person.

### **7.2 Workforce**

Agile working may not be suitable for all employees, irrespective of role. Some individuals may feel a loss of the regular face to face contact and/or may find it hard to work effectively outside of the normal office environment. Through routine welfare check ins, Raedwald will be vigilant to the signs that an employee may be struggling with working agilely. Equally the employee should raise any concerns they may have with their line manager at the earliest possible opportunity.

Managers must ensure that both they and their employees fully understand how any agile working practices will work in practice and ensure that any expectations are clearly communicated. Arrangements should be reviewed on a regular basis.

When employees are working in an agile manner they become less 'visible' which can create some anxiety for some managers. Monitoring employee output must go beyond looking at the level of activity to focus on other measures such as the quality of the work and the progress against objectives. These measures reflect a much more accurate picture than an employee being present at a desk in the office for prescribed periods of the time during the day.

Agile working must not adversely impact on business effectiveness and it will be that for specific times of the day or week individuals need to be contactable to meet business need. Many employees are required to participate in meetings with external partners and consideration must be given as to how this requirement can be met given that other organisations may not work agilely.

Expectations should be made clear to the individual and with the team. It is important that hours of work are understood and that individuals separate work and non-work time to ensure privacy.

### **7.3 Split between attending work and working remotely**

Expected level of attendance at the [workplace/office]:

We expect most employees to spend [40]% to [60]% of their working time at the [workplace/office]. Your contract of employment sets out the days on which you are expected to attend the [workplace/office]

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and the days on which you are expected to work remotely.

The number of days per week each employee spends attending the [workplace/office] compared with working remotely will vary, depending on:

- their individual circumstances;
- the nature of their role;
- what is happening within their role and team at any particular time; and
- the needs of our organization, including the space we have available at our work locations.

#### 7.4 Taking individual circumstances into account

Our organisation recognises the benefits of being flexible and that this schedule could be difficult for some employees to follow. For example, you could:

- live a significant distance from the [workplace/office] and it would be more efficient for you to spend more time working remotely; or
- have challenges with your working environment at home that mean that remote working is difficult for you and you would like to attend the [workplace/office] more often than this.

Please speak to [your line manager/the HR department] if you think that you would benefit from departing from the expectation that you spend [40]% to [60]% of your working time at the [workplace/office].

Your [line manager/head of department]'s agreement is required to depart from this norm. [Depending on the nature of the additional flexibility that you are seeking, we may ask you to make a formal flexible working request - see Requesting flexible working below.]

#### 7.5 Our workforce's need to be flexible

Given the degree of flexibility that our hybrid working arrangements provide, we expect our workforce to be flexible.

You may be required to attend work on particular days at the request of your [line manager/head of department], for example for in-person training and for meetings that your [line manager/head of department] has determined are best conducted in person.

Similarly, there may be circumstances in which we ask you to work remotely, or to work from such other place as we may reasonably require, when you would otherwise expect to attend the [workplace/office], for instance:

- for operational needs, for example if we have too many employees attending the [workplace/office] on specific days; or
- for coronavirus-related reasons, for example in the event of a lockdown/government guidance that employees should work from home if they can.

In such cases, you will be given as much notice as possible.

## 8 Safe-working measures

Your safety is our priority and we have put in place the safeguards in our organization.

[Highlight what precautions your organisation is taking for employees who are attending work, based on the Government's guidance on a range of different types of work, Reducing the spread of respiratory infections, including COVID-19, in the workplace.

We encourage our workforce to let us know if they have any concerns, have identified any potential risks, or have any suggestions for further adaptations we can make. You can do this by raising concerns or making suggestions to Natalie Quinton.

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You have a role to play in ensuring our staff can work in a safe environment and you must follow our safe-working instructions. A failure to do so may be a disciplinary offence and dealt with in accordance with our disciplinary procedure.

## 9 Arrangements while working remotely

### 9.1 Information Governance

Employees must ensure that all information (including information that is held on computer, mobile phone or other device) is secure and cannot be accessed by other parties. Policies relating to sensitive and confidential information must be complied with. Failure to keep information secure will be considered as a serious matter and will be dealt with in accordance with the Disciplinary Policy.

Under no circumstances should any other person than those authorised by the Raedwald be allowed to access any equipment provided. Any work setting outside of the Raedwald premises should be assessed by the user for any perceived information governance risks prior to the commencement of agile working.

Examples of these risks include the potential to:

- Accidentally breach confidentiality
- Disclose sensitive data to unauthorised individuals
- Lose sensitive information
- Spread computer viruses
- Cause operational or reputational damage

All employees should be aware of their information governance responsibilities to Raedwald.

### 9.2 Data protection

Remote workers are under a duty to:

- practice good computer security, including using a unique password for your work laptop [and any other devices you use for work];
- keep all hard copies of work-related documentation secure, including keeping documents locked away at all times except when in use; and
- ensure that work-related information is safeguarded when working in public spaces, for example by:
  - positioning your laptop so that others cannot see the screen;
  - not leaving your laptop unattended; and
  - not having confidential/business-sensitive conversations in public spaces.

In addition, the laptop [and other equipment] provided by us must be used for work-related purposes only and must not be used by any other member of your household or third party at any time or for any purpose.

### 9.3 Health safety and security

The Health and Safety Act 1974 states that an employer shall ensure, so far as it reasonably practicable, the health, safety and welfare at work of all employees. This extends to employees who work agilely and staff who work at home.

As the supervision for agile workers or home workers is limited, the main responsibility will be with employee to ensure that they do their work in a way so as to ensure that they and other persons who may be affected, including other members of their household as well as the public, will not be exposed to risks to their health and safety. Employees must take measures to control risks whenever they are working in an agile manner, the following areas of health and safety policies may be relevant and the main points are outlined in the following paragraphs. A remote working self risk assessment checklist is contained in appendix 1. Employees may request a formal workstation assessment via the central team.

### 9.4 Display Screen Equipment Policy (DSE)

A laptop, notebook or tablet device is defined as portable Display Screen Equipment. It is each staff member's responsibility to make a judgement as to whether the environment that they are working in is conducive to ensuring their on-going health needs are met, considering the factors that are presented in

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the Display Screen Equipment element of the Health and Safety Policy. Equipment used by staff working in an agile manner must be provided by Raedwald because it is safe to use and does not give rise to any significant risks to health and safety. Employees are responsible for regularly inspecting their equipment and for reporting faults.

### 9.5 The Agile Working Environment

Agile working can take place in a number of environments, which may include 'hot-desk' areas provided by Raedwald or other partner organisations. A hot desk is defined as a "Workspace for any member of staff to use at any time." In order to support staff to work in an agile manner Raedwald may adopt the use of functional space. Functional space can be defined as space that is not team specific and can be used by any member of staff requiring a workspace in that area. Desks which are designated as a hot- desk should not contain any personal belongings such as photographs, plants, mugs etc. All desks should be cleared when vacated after each period of work so they are available for use by others. Before leaving the desk the user should use a disposable wipe to clean the desk and any equipment enabling the next person to start working.

### 9.6 Use and care of equipment

To assist you to work remotely, you are provided with appropriate equipment.

Employees are expected to take reasonable care of equipment provided to keep the risk of theft, data breach, damage and personal safety concerns to a minimum. Equipment should be regularly charged, synchronised and software updated. Problems with the equipment should be reported to the central team as soon as possible.

You should liaise with your line manager to ensure that your remote working set-up is appropriate and that you are working in a safe manner. However, you must also take responsibility for your own health and safety and that of anyone else who is affected by your work (for example others in your household when you are working from home).

You must notify your line manager if:

- you feel any discomfort due to working remotely (such as back pain); or
- you believe that there are any work-related health and safety hazards;
- any work-related accidents occur in your home.

Your line manager will escalate the matter to [name of individual/occupational health/the HR department] to look into what action can be taken.

### 9.7 Working hours

While working remotely, you must be available and working during your normal hours of work, as set out in your contract of employment.

We ask you to be mindful that you are not overworking - "downtime" from work is essential. To help maintain your wellbeing, please make sure that you take adequate rest breaks:

- Take your contracted time off for lunch each day.
- Even if you are busy, it is essential that you find the time to take a break of at least 20 minutes during each working day that lasts more than six hours.
- Ensure the time period between stopping work one day and beginning the next is not less than 11 hours.

Please be as clear as possible with your line manager about your hours of work for days on which you are working remotely. Making use of tools such as shared calendars and out-of-office messaging can help colleagues to be aware of your availability on these days.

### 9.7 Financial assistance

Employees may be able to claim tax relief for any household expenses incurred as a result of working from home,

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provided the expenses are solely work related. If you wish to benefit from this tax relief, see the Government's guide on claiming tax relief for your job expenses at [www.gov.uk/tax-relief-for-employees/working-at-home.](http://www.gov.uk/tax-relief-for-employees/working-at-home)]

### 9.9 Sickness

When working remotely, you should not work if you are unwell. If you are sick and unable to work, our [short-term sickness absence] policy applies.

You should notify your line manager by telephone as soon as reasonably practicable, preferably before you are due to start work and in any event no later than [one hour] after you are due to begin work.

### Agile Working Proposal

|                  |  |
|------------------|--|
| <b>Name</b>      |  |
| <b>Job Title</b> |  |
| <b>Site</b>      |  |
| <b>Base</b>      |  |
| <b>Date</b>      |  |

|                      |  |
|----------------------|--|
| <b>Review Date 1</b> |  |
| <b>Review Date 2</b> |  |

|  |  |
|--|--|
| <b>Your Proposed Working Pattern:</b><br>Please include details of agility requested, considering section 5 of the policy. |  |
| <b>In your view, describe how the aspects of your role will be maintained</b>  |  |

**Remote Working Risk Assessment Checklist**

This form will be used to assist you and your line manager to ensure that your remote working conditions comply with current best practice.

|                     |  |
|---------------------|--|
| <b>Line Manager</b> |  |
| <b>Employee</b>     |  |

|  |  |
|--|--|
| <b>Address where assessment was undertaken</b> |  |
| <b>Date completed</b>                          |  |
| <b>Review date</b>                             |  |

| <b>Working Practices</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> | <b>Date Completed</b> |
|--|------------|-----------|----------------------------------|-----------------------|
| Do you use Display Screen Equipment (DSE) more than one hour per day?                                  |            |           |                                  |                       |
| I spend 5 – 10 mins doing work other than DSE each hour  |            |           |                                  |                       |
| I am required to participate in meetings with external partners  |            |           |                                  |                       |
| <b>Health</b>  | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |                       |
| I am free of sore hands, joints or impaired grip   |            |           |                                  |                       |
| I am free of aches and pains, pins and needles in the neck, back, shoulders or arms                    |            |           |                                  |                       |
| I am free of visual problems such as headache, focussing difficulties or eye discomfort                |            |           |                                  |                       |
| I have had an eye test in the last two years   |            |           |                                  |                       |
| I have read health and safety information covering the safe use of DSE                                 |            |           |                                  |                       |
| I have arrangements for regular contact with my line manager   |            |           |                                  |                       |
| I am able to keep up to date and informed about my team and colleagues e.g. by attending team meetings |            |           |                                  |                       |
| <b>Workstation</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |                       |

|   |            |           |                                  |  |
|---|------------|-----------|----------------------------------|--|
| The design of my workstation allows me to work comfortably and efficiently                                      |            |           |                                  |  |
| I have sufficient room around the workstation to arrange the desk and chair comfortably                         |            |           |                                  |  |
| Cords and wires are positioned safely to prevent trips and falls  |            |           |                                  |  |
| The room has adequate lighting  |            |           |                                  |  |
| The room is a comfortable temperature for working   |            |           |                                  |  |
| <b>Work Equipment</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |  |
| My chair is stable with adjustable height and back support  |            |           |                                  |  |
| My chair is properly adjusted and is comfortable for my work  |            |           |                                  |  |
| I can rest my arms on the desk between tasks  |            |           |                                  |  |
| The writing on the display screen is easy to read   |            |           |                                  |  |
| The screen is free of reflection or glare from windows and lights   |            |           |                                  |  |
| I do not need an anti- glare screen   |            |           |                                  |  |
| I can easily read the keyboard  |            |           |                                  |  |
| I can position my laptop/keyboard and screen to a comfortable position directly in front of my seating position |            |           |                                  |  |
| I do not need a document holder   |            |           |                                  |  |
| When I work, my feet can rest flat on the floor or I have a foot rest to support my feet                        |            |           |                                  |  |

|  |            |           |                                  |  |
|--|------------|-----------|----------------------------------|--|
| My mouse is used within forearm radius from the edge of my desk  |            |           |                                  |  |
| My mouse is used with my hand flat on the desk and directly in front of the mouse                                |            |           |                                  |  |
| My screen is at the correct height, i.e. the top of the screen is level with my eyes or slightly lower           |            |           |                                  |  |
| <b>Electrical Safety</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |  |
| My equipment has been electrically tested (date)   |            |           |                                  |  |
| <b>Security of information</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |  |
| Is your home secure from intruders?  |            |           |                                  |  |
| Do other people in your accommodation have access to the area where you will be undertaking Raedwald business    |            |           |                                  |  |
| <b>Confidentiality</b>   | <b>Yes</b> | <b>No</b> | <b>Comments/Actions Required</b> |  |
| I will only use equipment supplied by the Raedwald for work purposes   |            |           |                                  |  |
| My passwords etc are kept secure and not divulged to anyone  |            |           |                                  |  |
| I can confirm that I will not transport any confidential data on non-encrypted storage devices                   |            |           |                                  |  |
| I will shred confidential information or dispose of in the confidential waste bins provided in Raedwald premises |            |           |                                  |  |
| My computer will be locked when I am away from the workstation   |            |           |                                  |  |

| Accidents/First Aid/Fire Security   | Yes | No | Comments/Actions Required |  |
|---|-----|----|---------------------------|--|
| I know the procedure for reporting any accidents or work- related illness                                   |     |    |                           |  |
| I have access to a first aid kit  |     |    |                           |  |
| I am aware of fire evacuation procedures (applicable to working from locations other than RT premises/home) |     |    |                           |  |

### Working from Home

At times, staff may be required to work from home (WFH). The following procedures apply. Staff must have gained authorisation from the CEO, through their line manager, before working from home.

### Daily Routine

How and when you start each workday is a crucial piece of the puzzle to ensuring you're productive and comfortable when working from home. It's important to treat each workday like a day in the school, but there's more to it than that.

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1. Organise your days with recurring tasks. Example: On Mondays do X, Tuesdays do Y, Wednesdays do Z, etc.
  2. Get dressed in the morning as though you are going to an actual office.
  3. Do schedule breaks.
  4. Make a task list and be prepared to change your priorities at the drop of a hat. Because you're at home, you're in a fluid environment. You may need to move to another room, change the hours you're working because the fridge decided to flood, or other events. Having a list allows you to switch up and remain productive, regardless of events.
  5. Working with young children at home and keeping them entertained can be challenging so it's important to get into a routine.
  6. Create a healthy routine that involves a proper breakfast, lunch and dinner.
  7. Turn off personal email and social media at a set time so you can focus in the same way you would at school.

### **Equipment and Work Environment**

Using the right equipment – be it a chair, keyboard or monitor – can help to have a big impact on how productively you work at the end of the day.

1. If you find a classic desk arrangement quite limiting, know you don't have to stick to it.
2. Make sure your screen is raised so that the top of the screen is at eye level. This can be done using an adjustable laptop stand, a box, or some books if necessary.
3. Adjust your chair height. Your arms should be at right angles, with forearms lightly supported by the work surface. You may need a footrest if your feet are not firmly on the floor.
4. Make sure your lower back is well supported. Support for your lower back will help encourage a good posture. You can use a folded towel to give you more support or consider a back-support cushion if needed.
5. Keep ergonomics in mind, and switch between positions often. It helps your mind and body.
6. When possible, having a dedicated office space with a door that can be closed is essential.
7. Set boundaries. Be it with your children or your partner. Just because you work from home doesn't mean you're always available for other duties.
8. Connect your computer to the big TV screen when needed. It serves as a great conferencing tool.
9. If you're going to do videos, make sure you have space where light doesn't cause issues, where it is quiet, where the sound doesn't reverb, and where you don't have confidential information on view.
10. Continually optimise and re-think your work environment.
11. Invest in sound-blocking earplugs or earmuffs. They'll save your family on days where the chaos is too much and you need quiet to concentrate.

### **Apps and Services**

Use apps that allow you to efficiently communicate.

1. Consistently using TEAMs will ensure you get up and get dressed each day.
2. Learn to use apps like Evernote to manage your workload, organise ideas and just keep on top of things.
3. Avoid constantly checking personal emails and social media, and turn off all the unnecessary notifications on your phone to avoid interruptions.
4. Ensure things you are working on are in sync with services like OneDrive. That way whatever you're working on is available everywhere.
5. Use apps in full-screen mode as much as possible to limit distractions.

### **Mental Health**

Maintaining your mental health is the most important aspect of working from home. You miss out on the impromptu encounters and conversations, which, at first glance, feel superficial, but after you've been working in your home office for a few weeks, you'll be longing for any human interaction.

1. Getting out of the home/office during the workday is essential for sanity. A short walk around the garden or another room is an excellent thing to do if possible.
2. Build time in your schedule to do some exercise at home. It improves your well-being. There's nothing like getting into another world to improve how you feel.

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3. Again, set boundaries. One of the biggest challenges, especially for those with a family, is family members thinking that working from home means you are always available for a phone call or errand. Communicate your schedule, and if needed, create “do not disturb day and hours”.
  4. Spend time outside if possible, when the climate allows. It’s astonishing how a little fresh air can improve the mind’s functioning.
  5. Avoid guilt. Taking a break at home is way harder than walking out of the office and going around the block.
  6. Have a designated workspace and office (preferably away from the kitchen).
  7. Use headspace apps, white noise machines, or audiobooks to help you sleep.

### **Physical Health**

Taking care of your eyes, back and overall physical health is just as important as mental health. A lot of these tips overlap with the equipment and work environment section above.

1. For five to ten minutes every hour: get up, move around and take your eyes off the screen
2. Eat healthily. Don’t rely on microwave meals and delivery orders.
3. 3.Look at Joe Wicks’ routines on YouTube – he does some 20-30 minute exercise classes which are good for your physical and mental health.

### **Tips for all Leaders and staff with responsibility for leading others**

Not only do we all have to learn how to work from home and remain efficient, leaders also have to learn how to effectively lead and manage remote workers.

1. Remote work works best when there are deliverables and deadlines.
2. Communicate well.
3. Utilise chat and video platforms.

### **Video Conference at RT**

Video conferencing is an alternative for ‘face to face’ meetings with one or many people without having to travel.

At RT we use video conferencing between professionals within RT to:

- Improve communication
- Increase productivity
- Reduce the need for travel (saving professionals time and mileage costs)

### **Respecting privacy and confidentiality**

Think about the topic you will be discussing, if you need to discuss highly sensitive confidential information consider that you do not always know where other people are (in a staff room / public space) and who can hear - professional manner is required at all times and thoughtful discretion when talking about pupils.

Look behind you in the space you intend to video conference, is there anything on the wall behind that could be confidential? If so, please remove or change the location of the conference. With high definition cameras, even small text on a note can be read very easily by other people in the video conference.

It may be appropriate to add a sign to the room you are video conferencing in that says ‘Video conference in progress, please do not disturb’. Or a note on the back of your laptop with a similar message.

When talking about pupils you should not be in a public place, or a busy area (either inside the school or outside of the school). An empty room is best, as you can control and manage who can hear your conversation.

### **Locations to video conference from**

Consider the conversations going on around you, make sure that people that enter the space you are in, know that you are on a Video Conference. You can mute yourself in the video conference, alert the people talking close to you, then unmute yourself.

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### **Video conferencing features**

Whilst you can take photos in the meeting through video conferencing features, it is not appropriate to do so without the full consent of the other attendees and a rationale of the reason to do this e.g. the capture a whiteboard / flip chart plan etc...

The chat feature can be very useful in providing additional resources and web links for the video conference. The chat feature is a professional space, the chat is saved and stored for future reference. Under no circumstances should the feature be used to share any information about a pupil or any information deemed sensitive or confidential.

If you intend to use screenshare, prepare your digital workspace. Check your desktop and make sure it is clear of data and files/sticky notes etc... Disable notifications and pop ups, so no emails or messages appear to everyone as you share your screen.

### **Video conferencing best practice**

In a group, it is best practice to nominate a chairperson to allocate speaking opportunities. The chairperson should introduce everyone and let everyone know if someone leaves or enters the Video conference.

Headphones are advised when in communal areas, partly for confidentiality and partly for better sound quality. There will be feedback/interference when phones/laptops are used near each other in the same meeting so it is advisable to be in a different room from others in the same conversation or to share a screen.

Videos can be turned off so that it is more like a phone conversation, which is useful when there are more than two people in the conversation (otherwise just a normal telephone call is fine!).

Stopping the video can help to improve the audio quality of the video conference.

### **Safeguarding**

If anything is said or shown on a videoconference that raises a safeguarding concern, follow the agreed procedures as set out in the RT Safeguarding & Child Protection Policy.

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## **Schedule 28 Leaving Raedwald Trust**

Staff notice periods are set as per individual staff contracts. Notice of resignation must be made in writing to your line manager. Formal acknowledgement of your resignation will be made and the exit process will begin.

You will be invited to an exit interview which will be undertaken by the Central team. During the interview, arrangements will be made for the return of Raedwald Trust equipment (laptop, mobile phone, badge, fobs, keys etc).

It is Raedwald Trust's policy to respond to reference requests in a standard, factual format. The reference will be completed by the Central team / CEO and will include job title, period of employment and whether there are any safeguarding concerns regarding the individual.