William Fletcher Primary School

Close & personal relationships at work policy

Policy Name	Close & Personal Relationships at Work Policy
Frequency of review	3 years
Written	September 2024
Reviewed	July 2026
Written by	OCC Policy
Next review date	July 2027

OXFORDSHIRE COUNTY COUNCIL

CLOSE AND PERSONAL RELATIONSHIPS AT WORK POLICY - SCHOOLS

1. Introduction

This Oxfordshire model policy has been drawn up following consultation with all the recognised trade unions and associations.

1.1. Advice and support on the application of this policy is available from the Schools' HR Advisor.

1.2. From time to time, personal relationships may exist or develop between work colleagues. They may arise at any time during an individual's employment, as well as exist prior to the employee joining Oxfordshire County Council (OCC) maintained schools.

1.3. Close and personal relationships could affect, or be perceived by others to affect, the credibility or objectivity of our operations and we therefore need to have guiding principles in place.

1.4. The golden rule is that each of us should ensure that our conduct is not called into question in performing our professional duties.

1.5. The term 'head teacher' has been used throughout this document, however depending on the size and structure of the school this role may be delegated to other members of the senior leadership team, school business managers or line managers as appropriate. Where the head teacher is subject to these procedures, it will be managed by the Chair of the relevant body or other nominated governor.

1.6. The term 'relevant body' has been used throughout this policy. In maintained schools this is the governing body. The differing structures of academies means that the academy trust will need to define the relevant body for the purpose of this policy.

1.7. It is recommended that academies who have chosen to continue to use the STPCD, Burgundy Book, and Green Book also adopt this model policy. Where an academy adopts this policy the word 'school' should be taken to refer to the academy.

2. Purpose

2.1 It is important that personal relationships at work are managed with care and sensitivity. This policy does not prohibit personal relationships at work. It is intended to provide an outline of the expectations placed on members of

staff and their managers so that such situations are dealt with fairly and consistently. It is also intended to protect staff so that they are not open to allegations such as impropriety, bias, abuse of authority, or conflicts of interest.

3. Scope

This document is applicable for Oxfordshire County Council (OCC) maintained schools. It is provided as advice for schools where the Governors are the employer.

Academies may adapt these guidelines should they wish to.

3.1 This policy applies to all employees working in schools. It should be read in conjunction with other relevant documents such as the Annex 1, Equality and Diversity in the Workplace Policy, Disciplinary Procedure , Safer Recruitment Practices and Declarations of Interest Form (Annex 2)

4. Equal Opportunities

4.1 The close and personal relationships at work policy must always be applied fairly and in accordance with employment law and Equality and Diversity in the Workforce Policy.

5. Responsibilities

5.1 The Headteacher is responsible for maintaining fair, consistent and objective procedures for matters relating to close and personal relationships at work

5.2 The headteacher has overall responsibility for the internal organisation, control and management of the policy in their workplace.

5.3 The members of the SLT (senior leadership team) or designated senior manager have responsibility for the internal organisation, control and management of their area of responsibility.

6. Definitions

6.1 Close and personal relationships include spouses, civil partners, family relatives, romantic involvements, close friends, and business and commercial relationships.

6.2 Working relationships include colleagues, contractors, agency workers, or any other third party with which the school does business.

6.3 If you have any doubts over whether a relationship with an individual falls within the scope of these guiding principles, please consult your line manager or head of department. Annex 2 form attached can be used to record this.

7. Principles

7.1 A personal relationship in itself will not advantage or disadvantage any employee. It is up to each member of staff to decide whether a personal relationship exists and, if so, declare to their line manager or appropriate member of the SLT any personal relationships which may give rise to a conflict of interest or any workplace advantage, perceived or otherwise. Where this is unclear, staff members are encouraged to discuss this with their line manager in the first instance. A declaration can be made through an email to the line manager but may need to be discussed further depending on the circumstances of the relationship (i.e. professional conflict of interest). (See Annex 2).

Line managers are responsible for dealing with these matters sensitively and effectively. For example, they should discuss matters with the parties concerned before taking any action in line with the policy. Line managers should take all reasonable steps to avoid actual and perceived conflicts of interest. Line managers are expected to maintain confidentiality, where appropriate, and should not disclose any information about personal relationships without first informing the staff member/s concerned. If this concerns a headteacher, the chair of governors is responsible. Advice should be sought from School's HR Advisor where relevant/necessary.

7.2 Where there is a relationship, line management responsibility should be avoided, including performance reviews. This should be delegated to an alternative colleague.

7.3 No employee will be unfairly treated or discriminated against on the basis of a personal relationship, perceived or other. Where this is the case, the employee should raise this concern with a senior manager in the first instance or School's HR Advisor.

7.4 Staff should always behave in a professional manner. For example, romantic signs of affection, etc. are not appropriate at work or around school premises. Equally, personal conflict should not be brought into the workplace.

7.5 It is not generally necessary to declare a personal relationship between two individuals who have little or no professional contact (for example, in unrelated roles where there is no line management responsibility or in two separate schools.

7.6 Failure to declare a personal relationship that has or could be reasonably perceived to have given rise to a conflict of interest or any workplace advantage could be considered as a disciplinary matter. Where there has been a declaration of interest, but the employee(s) allow the personal relationship to impact adversely on others in the workplace, could also be considered a disciplinary matter.

8. Appeals

8.1 Employees who wish to appeal against any disciplinary action arising from a breach of this policy should use the disciplinary procedure and they are entitled to a trade union representative.

8.2 Where employees consider themselves to have been treated unfairly as a result of their close personal relationship with another member of staff, they should initially raise this informally with their manager. If this is not appropriate or does not result in a satisfactory outcome, they should raise it formally by making use of the Resolving grievances policy and procedure.

8.3 If an employee has a concern about potential conflict of interest arising from personal relationships and the personal relationship of others, they should in the first instance raise this with a line manager in the school or with School's HR Advisor or the Chair of Governors if this involves the headteacher.

9. Further Guidance

9.1 Further guidance in the application of this policy may be found in Annex 1 and declaration of interest is in Annex 2. Further advice and support is also available from the School's HR Adviser.

10. Other relevant policies and procedures

a. Equality and Diversity in the Workplace Policy,
b. Disciplinary Procedure,
c. Safer Recruitment Practices

11. Review

11.1 The HR team will regularly review this policy to ensure it remains compliant and continues to meet the needs of the council.

Responsible Officer: Policy Manager

VARIATION OF PROCEDURES
This policy is not contractual, and it may be varied by the Council from time to time. Examples of variation include the need to comply with new legislation or best practice guidance. Should the Council decide not to apply the procedure, either in its entirety or in part, that will not amount to a breach of contract. Changes to the procedure will be made in line with the relevant consultation process and through raising employee awareness.
VERSION CONTROL
Date approved and published: September 2024 (Version 1.0)
Date to review policy: September 2027 (unless subject to legislative change)

VERSION HISTORY

Version	Date	Notes
1.0	September 2024	New policy

Annex A

1. Recruitment: Employees involved with the recruitment process should declare any personal relationship with any applicant. If such a declaration is made, consideration will be made to whether there is any potential conflict of interest and the employee may/may not remain part of the process.

   Successful applicants for employment with (Oxfordshire County Council maintained school) will be asked to declare if they have any family members or close relationships to an existing (Oxfordshire County Council maintained school) employee. This will not impact on the offer of employment, where the applicant is successfully appointed.

2. Existing staff members should declare to their heads of department or line managers any personal relationships that exist or develop with another member of staff or third party where:
   a. Both parties are required to cooperate over work matters where one party is seen or required to make/influence a judgement during the course of their duties which affects the other.
   b. Where there is a line management relationship between the parties.
   c. Where a change of role, promotion or transfer means that either of the above will happen.

3. Examples of potential conflicts of interest include (this is not intended to be an exhaustive list):
   a. The processes of recruitment and promotion;
   b. Authorisation of expenses, overtime or other financial gains;
   c. Discipline and Grievance proceedings;
   d. Line Management;
   e. Procurement and Contract Management;
   f. Appraisal and / or assessment;
   g. Pay recommendations.

4. Disciplinary action may be taken in line with the school's disciplinary policy as a result of the following:

   a. where a personal relationship has not been declared and results in unfair advantage or disadvantage to either party;
   b. where a staff member abuses their authority or influence to bring benefit or detriment to another individual;
   c. where a personal relationship has not been declared and brings (insert employer name) into disrepute;
   d. where there has been a breach in confidentiality;
   e. where the conduct or behaviour of a staff member (or members) is inappropriate or breaches professional standards;

The above list should not be considered exhaustive and if as a result of an existing or previous personal relationship, an employee's actions are perceived or have been shown to be unacceptable, formal action may be taken.

Annex 2

Declarations of Interest Form (to be put on the Interests Register)

Name and Post:
Service and Directorate:

Describe nature of conflict of interest – continue on a separate sheet if necessary

1.
2.
3.
4.
5.
6.
7.
8.
Action taken by Line Manager:
I acknowledge the Council Policy on Declaring and Registering Interests and declare the above interests. I confirm that I have no other activities, responsibilities or ownership entitlements that may lead to a conflict-of-interest situation. …….. …….. …… **Signature Employee Name & Position Date** …….. …… …….. **Signature Line Manager Name & Position Date**

Note: The completed form (signed and dated by employee and manager) should be emailed to: eps.consultants@hants.gov.uk emailed forms should be sent direct from the Line Manager as confirmation of authorisation.

Conflicts of Interest

Conflicts of Interest that you MAY have to declare
Family member is partner/director in a firm/company

Family member in a position of membership or general control or management of another public authority.
Family member employed by the Council
Family member in a position of general control or management with the Council

Note: interests only need to be declared:

- on your appointment with the Council
- if compulsory registration is required (see above table)
- if there is an actual or potential conflict of interest
- a declaration you made previously has materially changed

Definitions:

Family means your parents, parents-in-law, stepparents, spouse, partner, child, siblings.

Immediate Family means your spouse or partner

Partner means any person with whom you co-habit as a spouse (and includes a same sex partner).