



Health and Wellbeing Policy and Procedure Version 11.1

<p>Important: This document can only be considered valid when viewed on the Education Alliance website. If this document has been printed or saved to another location, you must check that the version number on your copy matches that of the document online.</p> <p>Name and Title of Author:</p>	<p>Lisa Longstaff, Director of HR and Governance</p>
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Monitoring:	This policy will be monitored in conjunction with trade unions via the JCNC on an annual basis.
Target Audience:	All staff
Related Documents:	<p>Special Leave Policy Equality, Diversity and Inclusion Policy Health and Safety Policy Domestic Abuse Policy Women at Work Policy Grievance Procedure Disciplinary Policy Capability Policy Redeployment Procedure Substance and Alcohol Misuse and Smoking Policy Data Protection Policy www.cipd.co.uk www.acas.org.uk</p>

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POLICY STATEMENT

We are here to make great schools and happier, stronger communities so that people have better lives. We do this by:

- Always doing what is right
- Trusting in each other and standing shoulder to shoulder
- Doing what we know makes the difference

Doing what is right means always acting with integrity, in the interests of others and being honest, open and transparent.

The Trust is committed to a Whole School Approach to health and wellbeing, which includes pupils, parents/carers and staff. This policy focuses on the health and wellbeing of our staff. We aim to help our staff remain happy, healthy, productive and well. It is important to us that our staff feel energised at work, connected to a sense of common purpose, and that they feel equipped and able to thrive, succeed and achieve. We believe that health and wellbeing at work results from a culture where staff feel valued, influential, supported, trusted and listened to. Our culture forms the foundation which our health and wellbeing pillars depend upon. We believe that our culture results in a healthy and enjoyable working environment. It is a culture based on professional trust, recognising the complex and multi-faceted lives our employees have. We see our workforce as a team of unique individuals working towards a common goal. Leaders across the Trust are committed to ensuring workloads are manageable and that staff are able to enjoy their lives at work and outside of work, where they feel able to contribute and succeed, and achieve a healthy work-life balance. We recognise that there are times in people's lives where they may face challenges, and we aim to support them during those difficult times, with easy access to the support, information and time they may need to ensure they are able to meet those challenges resiliently.

We recognise that our staff may face challenges at work and outside of work, and we aim to provide support in a flexible way, encouraging staff to talk to their managers as their circumstances and needs change, enabling staff and managers to work together proactively to anticipate and respond to changing circumstances. In doing so, we hope that staff are better placed to manage challenges, feel positive at work and are able to continue working as their lives and circumstances shift.

Our work environments are regularly reviewed to ensure they are conducive to staff wellbeing, from the cleanliness, access and layout of rooms, car parking and bike storage facilities, visual aspects such as colour schemes and notice boards, and freely available coffee, tea and water.

1. PURPOSE AND SCOPE

The workplace should be a safe, engaging place for staff, where they feel they can contribute to a common purpose. We provide staff with information, access to resources, and support when they need it (e.g. through our partnership with MIND and our Employee Assistance Programme (EAP)). Managers are trained and supported to enable them to respond well to staff when they reach out for support, equipping them to have good conversations. Managers and HR colleagues work together to ensure we take into account individual's unique circumstances, with discretion, care and understanding, whilst also remaining fair and consistent.

Our health and wellbeing pillars sit upon a cultural foundation of professional trust, ethical leadership and human connection:



We take our duty of care seriously and we have effective health and safety controls in place, supportive policies and procedures, skilled and competent managers and leaders, and jobs which are satisfying, encouraging teamwork, creativity and accountability. We work closely with a range of external bodies, including trade unions, Occupational Health Services, the EAP, Education Support, MIND, Salary Finance and a range of coaches and mentors. Staff are encouraged to seek support before their health deteriorates to the point of either suffering with ill health at work or being absent from work due to poor health and wellbeing. Support can often enable staff to tackle health issues at an early stage, enabling them to remain at work and enjoy healthy lives outside of work. Whilst this minimises the risk of staff absence due to ill health it doesn't remove it, and where staff are absent from work due to ill health they will be treated with dignity, respect, sensitivity and care. It is recognised that high levels of attendance has a positive and significant impact on pupil experience. Sickness absence is not purely a response to illness or injury, but is also reliant on employee resilience, personal, work and organisational factors. The Trust aims to ensure that staff are fully supported, focusing on preventative measures wherever possible, ensuring our schools are healthy places to work with support in place for those in need. Appendix 1 details some of the activities in place that underpin the pillars described above.

2. ROLES AND RESPONSIBILITIES

The **Trust Board** is responsible for approving this policy. Where dismissal may be a consideration under this procedure, the Scheme of Delegation will be followed.

The **CEO, Headteachers and Local Governing Bodies** are responsible for ensuring that staff are treated with care and sensitivity, fairly and consistently in the application of this policy and procedure.

The **HR Department** is responsible for ensuring that all staff are aware of this policy and procedure. The HR team will also ensure that the policy is implemented fairly and consistently and that staff are treated with care, sensitivity, dignity and respect. The team will endeavour to procure, manage and

advertise supportive measures (such as the EAP), encouraging staff to access additional support as and when required. The team will also provide managers with access to appropriate training, advice and guidance to enable managers to manage issues relating to health and wellbeing sensitively, professionally and equitably, whilst also recognising that each case and individual is unique. The HR Department is responsible for:

- Providing help, advice, signposting, support, guidance and information to line managers, employees, leaders, managers, governors and trustees.
- Working in partnership with trade unions, ensuring staff are adequately supported and that they understand the policy and processes.
- Co-ordinating appropriate redeployment processes as detailed in The Education Alliance's policies and procedures as and when appropriate.
- Ensuring policies and procedures adhere to current legislation and that staff and managers have access to appropriate training and support.

Managers and staff with supervisory or leadership responsibilities must ensure they carry out their responsibilities fairly and consistently, dealing with health and wellbeing matters swiftly and effectively whilst maintaining confidentiality wherever possible. Line managers must also:

- Attend appropriate training
- Brief their staff of any changes to this policy and procedure
- Understand and apply the ethical leadership qualities in their day-to-day practice, ensuring they lead and manage with professional trust, kindness, courage, optimism and fairness
- Ensure staff understand how they contribute to the work of the school and the Trust, applying the workload charter effectively
- Reach out to staff, ensuring they understand they will be listened to if they raise concerns
- Notice changes that may be a result of health and wellbeing issues, either in the workplace or outside the workplace, and respond appropriately and effectively (e.g. signpost, stress risk assessments, wellness action plans), seeking HR support as and when required
- Monitor sickness absence within their team and ensure their team experiences a safe and healthy working environment, seeking support from HR colleagues if any issues or concerns arise (e.g. unsustainable absence levels).
- Work with HR colleagues to ensure that employees are treated fairly and consistently in the application of this policy and procedure
- Ensure employees are given appropriate support to assist them in maximising their attendance, helping them to consider a range of options to enable them to attend work (e.g. reasonable adjustments; support and intervention; access to external services)
- Keep in contact with employees in their teams that are absent due to sickness
- Consider with employees any preventative measures that may help staff attend work and minimise sickness absence
- Have return to work discussions with staff as soon as is reasonably practicable on an employee's return to work following sickness absence
- Comply with the requirements of the Equality Act, seeking advice and guidance from the HR Department
- Undertake appropriate risk assessments with staff, working collaboratively, managing and escalating risk as appropriate
- Completing wellness action plans and risk assessments with staff where appropriate, with care, sensitivity and understanding

All **staff** have a responsibility for their own health and wellbeing. In seeking additional support and guidance when they need it they may find ways to prevent, minimise or manage any issues relating to their health and wellbeing. Employees must:

- Follow their school's absence reporting procedure
- For absences exceeding 7 calendar days, the employee must submit a fit note from their GP or another treating medical practitioner
- Participate in return to work discussion and sickness meetings
- Not undertake any activity that might be detrimental to their recovery and return to work

The HR Department works with the **Occupational Health Department**, which undertakes:

- Pre-employment health screening
- Mid-employment health screening
- Ill-health retirement assessments

Referrals to the Occupational Health Department are made by the HR Department, with the individual's consent, and the Occupational Health Department advises the organisation on a range of health matters, including fitness to work, phased return to work, adaptations and/or restrictions, reasonable adjustments, potential lighter duties and redeployment.

The **Employee Assistance Programme (EAP)** provides staff with free access to confidential counselling, telephone helplines and online resources, 24 hours a day, 7 days a week. Provision includes:

- Independent health and welfare information and advice, support and guidance
- Access to resources, tools and techniques to enable healthy lifestyle choices, increasing awareness and understanding

The current EAP provider is Care First, accessed through Sodexo, and they can be contacted via the telephone on (0808 168 2143), or at www.carefirst-lifestyle.co.uk (the username is education001 and the password is employee).

All staff working in the education sector can access **Education Support**, which provides free counselling, financial support and resources. They can be contacted via the telephone on 08000 562 561 or online at www.educationsupport.org.uk.

3. EQUALITY AND DIVERSITY

The Trust is committed to:

- Promoting equality and diversity in its policies, procedures and guidelines, adhering to the Equality Act 2010.
- Delivering high quality teaching and services that meet the diverse needs of its student population and its workforce, ensuring that no individual or group is disadvantaged.
- Supporting staff in line with equality legislation.

Absences, which are as a direct consequence of a disability, will be recorded and managed as sickness absence in line with this policy and procedure.

It is vital that the manager, the employee, the employee's trade union, the HR Department and the Occupational Health Department work together to discuss disability, potential reasonable adjustments and the options available to support the employee.

4. DEFINITIONS

The Education Alliance provides support for staff with the aim of preventing ill health and sickness absence wherever possible. Where sickness absence occurs, staff will be encouraged to access support and they will have return to work discussions after every sickness absence, to ensure managers are able to check their fitness for work and to establish whether there are any potential workplace triggers to be aware of. The manager and employee will jointly consider any workplace risks, discuss any resources or support available to the employee. Return to work discussions may result in supportive interventions, a greater awareness of any potential disability/long-term condition, enabling the manager and employee to discuss any support or intervention that may be helpful. For some situations, the completion of a wellness action plan may be useful (HR can provide a copy of the template to be used).

For the purpose of this policy and procedure, sickness absence is defined as follows:

- Short term/persistent sickness absence is where there are a number of relatively short periods of absence.
- Long term sickness absence is a continuous absence of 4 weeks or more or where it is expected that the sickness absence will last for 4 weeks or more.
- Unauthorised absence is where an employee does not provide a reason for absence and/or fails to follow the sickness absence reporting procedure. Managers will follow up incidences of apparent unauthorised absence to obtain clarification. Unauthorised absence may be dealt with in accordance with the Disciplinary Policy and Procedure and it may result in loss of pay.

5. SWIFT INTERVENTION

The Health and Safety Executive (HSE) advises that early intervention is key to enabling staff to return to work speedily and effectively. It is recognised that healthy workplaces and being at work is good for an employee's health and wellbeing.

In assisting employees to remain at work or return to work, a rehabilitation programme may be considered by the employee, their line manager, the HR Department and the Occupational Health Department. There may be a temporary change in hours and/or duties agreed, which, under normal circumstances, will gradually phase an employee back to full capacity. A phased return to work will normally be reviewed on a weekly basis. An employee on a phased return to work will receive full normal pay.

6. SICKNESS ABSENCE REPORTING

It is expected that staff will attend work wherever reasonably possible and that when they cannot due to illness or injury, they follow the reporting processes as detailed below:

- Notify the school via the school's procedure for reporting absence as soon as is practicable to enable cover arrangements to be made where necessary. Notification should be by the employee; unless this is not possible.
- Notify the school of planned absences (such as a hospital appointment) at the earliest opportunity.
- Communicate regularly with the school via the absence reporting line, the line manager and possibly the HR Department. When contacting the absence line employees must specify the date, their full name, their department, the reason for their absence and expected length of absence. Employees must keep the school informed and must contact the absence line to confirm their intention to return to work.

It is important that employees seek help and support whenever they need it. Their line manager, the HR Department and their trade union may be able to provide employees with advice, guidance and support. Employees are encouraged to speak to their line manager first wherever possible as their illness/injury may affect their ability to work and their line manager may be able to offer assistance. It is important that the school be alerted to any problems before they adversely affect the employee's ability to safely carry out their job.

All employees will have a return to work discussion with their line manager on their return to work. Appendix 2 provides managers with guidance in terms of the content of a return to work discussion. It may not be a long conversation and doesn't necessarily need to take place face-to-face. A good return to work discussion assists a manager to check the employee's fitness to return to work and to explore any potential underlying issues that may benefit from additional intervention, monitoring and review. If the employee has reached an unacceptable level of absence, which is affecting pupil learning, service delivery or creating additional pressure within a team, they may be asked to attend a sickness meeting. It is the employee's responsibility to engage in this process to ensure that the right support is provided to them consistently and fairly.

7. FIT NOTES

For sickness absence exceeding 7 calendar days, the employee must obtain a fit note and submit it to the Cover Officer/HR Department. Fit Notes must run consecutively so there are no gaps in the dates stated. The employee must keep their line manager informed in advance of their return to work date, giving them as much notice as possible.

Failure to produce a fit note may result in the absence being classed as unauthorised, which may result in loss of pay for that period. Fit notes advise whether an employee is unfit for work or fit for work with adaptations/reasonable adjustments. Such advice from their GP may include a rehabilitation plan, recommending alterations in their working hours or working pattern, adjusted duties and workplace adaptations. It is advisable for managers to talk to HR colleagues about fit notes and any restrictions or recommendations detailed within them. Managers, with support from HR colleagues, will discuss the operational feasibility of any restrictions or recommendations (including phased return to work guidance) prior to agreeing a return plan, as they will need to jointly consider:

- Operational feasibility
- Safety and risk assessments
- Effect on colleagues, service delivery and pupil learning
- The effect the recommendations are likely to have on the ability of the individual to remain at work

8. MEDICAL APPOINTMENTS

All staff are expected to make every effort to arrange appointments at times, which are either outside their normal working time, or where this isn't possible, as close to the start or finish of their normal working day or shift. However, it is recognised that this is not always possible. If staff need to attend a medical appointment during working hours they should seek approval as per the Special Leave Policy.

9. PRE AND POST OPERATIVE TREATMENT

There may be occasions when an employee is required to follow a course of treatment before or after undergoing surgery. Such absence will normally be recorded as sickness absence.

10. PREGNANCY RELATED SICKNESS ABSENCE

Absences, which are as a direct consequence of pregnancy, will be recorded and managed as sickness absence in line with this policy and procedure, and all absences whilst pregnant should be reviewed separately by the line manager as part of an on-going risk assessment. If during the 4-week period before the beginning of the employee's expected week of childbirth, the employee is absent from work due to sickness relating wholly or partly to their pregnancy, this may trigger the start of their maternity leave.

11. INCIDENTS AT WORK

Where an employee's sickness absence is attributed to an accident, assault, injury or disease whilst undertaking the duties of their post, the manager should discuss the circumstances with HR colleagues and Appendix 3 provides further guidance relating to pay and absence in such circumstances. Where the employee has been negligent or breached the Trust's rules, policies, procedures or guidance or the Health and Safety at Work Act 1974, and their actions have then resulted in an accident, assault, injury or disease, their absence will be managed in the usual way (although the issue may also be considered under the Disciplinary Policy and Procedure). Serious accidents must be reported (e.g. RIDDOR, BI100A).

12. THIRD PARTY CLAIMS

Where an employee is absent from work due to injury or illness which is a result of a third party, and the employee successfully claims against the third party, the employee will reimburse The Education Alliance for the amount of pay they received whilst absent from work.

13. SUSPENSION OF SICK PAY

There may be exceptional circumstances where the Trust may suspend sick pay. For example, where an employee fails to follow the sickness reporting procedure; fails to provide appropriate documentation, or; where the sickness is not genuine. In such circumstances, the employee will be advised of the grounds for suspension of sick pay, and they shall have a right of appeal against the decision. If the appeal panel decides that the grounds were justified, the employee shall forfeit the right to any further payment in respect of that period of absence. Abuse of the sickness scheme may be managed under the Disciplinary Policy and Procedure.

14. SECONDARY EMPLOYMENT

Employees should not undertake employment outside The Education Alliance, paid or otherwise, whilst off work due to sickness, unless agreed by the CEO, the Executive Principal or their Headteacher.

If an employee is absent from work due to sickness and works elsewhere without agreement, the matter may be viewed as a disciplinary matter, therefore staff must produce medical clearance which states that they are medically unfit for the work they undertake at The Education Alliance, yet medically able to undertake other work prior to undertaking work elsewhere whilst absent from work due to sickness. Line managers are encouraged to involve HR colleagues in any issues relating to secondary employment.

15. ANNUAL LEAVE

Staff on long-term sickness absence are legally entitled to carry forward untaken statutory annual leave, which they continue to accrue whilst on sickness absence. If an employee leaves or is dismissed whilst on long-term sickness absence, they will be entitled to pay in lieu of untaken statutory annual leave.

Staff on long-term sickness absence may also request to take annual leave whilst on sickness absence and they may request to use some of their annual leave as part of a structured return to work plan.

If an employee becomes unwell whilst on annual leave, they should contact their HR Department if they wish to reclaim their annual leave.

16. RETURNING TO WORK

As soon as is practicable, upon returning to work, managers must have a return to work discussion with the employee to discuss their fitness to return to work and consider any additional support they require (such as a rehabilitation programme). It is helpful for managers to make a few notes of the discussion, particularly if a member of staff has had a few days/weeks absent or where there is potentially an underlying issue. The manager should email the notes to the employee and to HR, to ensure a record of the discussion is agreed and retained and any actions can be followed up.

17. SHORT TERM ABSENCE MEETINGS

Absence affects service delivery, pupil learning, levels of health and wellbeing for other staff and costs. The HR department will monitor sickness absence levels in their schools and they will work with managers to ensure absence is managed effectively, fairly and consistently. Where an absence record is having a significant effect on either the individual's ability to undertake their role, service delivery or teaching and learning, and the effect is likely to continue or recur, the manager should contact their HR team for advice. It may be appropriate for the manager, with their HR colleague, to arrange to meet with the employee and their trade union (or work colleague if they are not in a trade union) to discuss options. Their line manager will normally chair the meeting. Appendix 5 provides managers with a guide for absence meetings.

If an employee is unable to improve their attendance, and their attendance continues to effect pupil learning, service delivery, or the health and wellbeing of colleagues, it may be necessary for dismissal to be considered. If the Trust has considered all other options and discussions have failed to result in significant and sustained improvements, a meeting may be arranged to consider the potential dismissal of an employee. The Scheme of Delegation details the make-up of the panel.

Where the panel believes that options open to the Trust have not been adequately considered, they may decide to extend the review period, establishing appropriate actions which will form part of an improvement or rehabilitation plan, with a review date of three months at the most being established.

Alternatively, they may seek an adjournment to consider the case, and if additional information is required, they will reconvene the meeting and share the information with the employee and their representative.

If the panel believes that the Trust has exhausted all options and where available information indicates that it is likely that the sickness absence issues will continue, the panel may decide to dismiss the employee, with notice. Depending on the circumstances of the case, this could be a dismissal on the grounds of ill-health capability or ill-health retirement.

18. LONG TERM ABSENCE

When an employee is absent for at least 4 weeks continuously or when it is expected that their absence will last for 4 weeks or more, their absence will be viewed as long term. In those circumstances, their line manager must seek advice from the HR Department who may refer the employee to the Occupational Health Department, for medical advice and guidance. On receipt of medical advice, the manager and HR will meet with the employee and their representative, where they have one, to discuss the detail of the report and to consider next steps (e.g. how/when the employee may return to work, and any restrictions, adaptations or adjustments advised). Appendix 6 provides further guidance regarding the management of long term absence.

In cases of long term sickness absence, the employee may be subject to a potential dismissal meeting as per the Scheme of Delegation once all other options have been exhausted.

If the employee is dismissed on the grounds of ill-health capability, they will have a right of appeal. The Scheme of Delegation advises that panel members must not have not been involved in the decision to dismiss the employee and an HR representative.

19. APPEAL AGAINST DISMISSAL

An employee has a right of appeal against dismissal under this process. If the employee wishes to appeal, they must do so in writing to the Director of HR and Governance within 10 working days of the date of the letter confirming their dismissal. The appeal letter must clearly state the grounds for appeal and the appeal letter must be acknowledged within 10 working days of receipt of the letter. The employee is entitled to be heard personally at the appeal. They will be encouraged to be accompanied by either a trade union or work colleague.

The appeal may be dismissed, allowed in full or allowed in part by amending the original decision made at the final stage meeting.

20. DISCIPLINARY PROCEEDINGS

If the employee is facing disciplinary proceedings and is likely to be absent due to illness or injury on a long-term basis, the Trust may have no alternative, but to place the disciplinary proceedings on hold whilst the sickness absence is managed via this policy and procedure. In such circumstances, the employee will be informed that the disciplinary matter has been placed on hold pending their recovery. However, it may be in the best interest of the employee and the school for the employee to be allowed to make written submissions rather than attending a disciplinary investigation or hearing. The Disciplinary Policy and Procedure has further detail on this option and the employee will be encouraged to access support via their trade union.

21. MEDICAL SUSPENSION

In exceptional circumstances, the Trust may decide to suspend an employee on medical grounds. This may occur where concerns are raised regarding an employee's ability to undertake their duties safely due to mental, emotional or physical illness or injury and reasonable adjustments cannot be put in place to enable the employee to remain at work or, the interim reasonable adjustments wouldn't adequately enable the employee to work safely in their role. Temporary redeployment into another role should also be considered prior to a medical suspension taking place. The CEO, Executive Principal or Headteacher has the authority to medically suspend a member of staff. The Trust must seek medical advice at the earliest opportunity to limit the period of time an employee remains on medical suspension. Any member of staff potentially facing medical suspension will be consulted and the Trust will seek medical advice and support in considering the risks and possible options at the earliest opportunity. Medical suspension would be a last resort and the employee would be paid full normal pay in such circumstances.

22. MONITORING COMPLIANCE WITH AND EFFECTIVENESS OF THE POLICY

Effectiveness and compliance of this policy and procedure will be monitored on an annual basis by the HR teams across the Trust. Equality impact assessments should include data enabling a review of the impact of the policy and procedure alongside equality requirements and protected characteristics.

23. REVIEW

This Policy and Procedure will be reviewed within two years of the date of implementation with recognised trade unions via the JCNC.

Health and Wellbeing Pillars and Activities

Health and Wellbeing Pillars

Pillars	Activities
Good Work	<p>Manageable workloads (https://www.theeducationalliance.org.uk/workload-charter/)</p> <p>Ethical leadership (https://www.theeducationalliance.org.uk/wp-content/uploads/Ethical-Leadership-Qualities.pdf)</p> <p>Trust and autonomy</p> <p>Job clarity and satisfaction</p> <p>Flexibility (https://www.theeducationalliance.org.uk/wp-content/uploads/Flexible-Working-Procedure.pdf)</p> <p>Facilities and resources needed to do the job</p> <p>Appropriate pay, reward and recognition</p> <p>Policies and procedures that align with our culture and ethos</p> <p>A culture of mutual respect and staff treating each other well</p> <p>Open and effective two-way communication</p> <p>Removing barriers, encouraging collaboration across our schools, and simplifying systems and processes</p> <p>Removing activities that add little or no value</p> <p>Equipping managers and colleagues to support one another (e.g. time to talk, asking twice, wellbeing days)</p> <p>Informal resolution wherever possible (e.g. management advice, mediation)</p> <p>Inclusive policies (e.g. effective change management, transparency in policies and procedures, Equality, Diversity and Inclusion Policy) (https://www.theeducationalliance.org.uk/wp-content/uploads/Equality-Diversity-and-Inclusion-Policy.pdf)</p> <p>Investment in staff rooms and work spaces</p> <p>Free tea, coffee and water in staff rooms</p> <p>Canteens offering a range of food at reasonable prices</p> <p>Ethical, accessible and visible governance</p> <p>Community responsibility (e.g. public service)</p> <p>Mentoring, coaching and career development opportunities available</p> <p>Career development, succession planning and professional development available for all professions across the trust</p> <p>Training for managers includes self-awareness and awareness of others (e.g. PRINT/MBTI), having difficult conversations, giving and receiving feedback)</p> <p>Performance development reviews encourage all staff to consider what they have learned and how they continue to build on their learning and improve</p> <p>Increased usage of the apprenticeship levy to provide staff with opportunities to develop and gain qualifications at work</p> <p>Recognition and thanks for good work</p>

	Flexible working options, including working from home, leaving site during PPA and special leave (e.g. attending children's sports days)
Physical Health	<p>Free flu vaccinations</p> <p>Paying for annual prescriptions</p> <p>Health promotion activities</p> <p>Health checks (e.g. NHS)</p> <p>Time off to attend health appointments</p> <p>Occupational Health support</p> <p>Free eye tests</p> <p>DSE checks</p> <p>Health and Wellbeing Policy that includes return to work chats, phased return to work and collaboration between employees, managers, HR colleagues and Occupational Health specialists https://www.theeducationalliance.org.uk/wp-content/uploads/Health-and-Wellbeing-Policy.pdf</p> <p>Discounts for sports centre, onsite sports centre with reasonable membership rates at one of our schools and staff-led groups (e.g. running)</p> <p>Healthy menu choices in onsite canteens</p> <p>Cycle to work scheme and bike sheds/racks</p>
Mental and Emotional Health	<p>Working to remove the stigma relating to mental and emotional health and wellbeing</p> <p>Be Well Champions in school supporting the Whole School Approach</p> <p>Be Well Programme, involving MIND, supporting the whole school community</p> <p>Policies and procedures providing support and guidance, encouraging staff to reach out and equipping managers and colleagues to respond appropriately (e.g. Menopause Policy, Women at Work Policy, Domestic Abuse Policy, Bereavement Policy, Special Leave Policy) https://www.theeducationalliance.org.uk/trust-policies/</p> <p>Adult Mental Health First Aiders</p> <p>Wellness action plans and stress risk assessments</p> <p>Training and guidance for managers regarding having difficult conversations</p> <p>Employee Assistance Programme with free access to confidential counselling, resources, webinars and information</p>
Social Wellbeing	<p>Opportunities to network and connect (e.g. training days/joint working/groups (e.g. menopause groups/invitations to meet with CEO/Headteacher), staff rooms equipped to encourage breaks and chats with colleagues)</p> <p>Communications up, down and across the organisation, providing staff with various opportunities to have a voice and influence the future direction (e.g. staff surveys, local governing bodies, suggestions, forums, CEO and Headteacher sessions)</p>

	<p>Positive working relationships with colleagues, managers and leaders, based on our ethical leadership qualities</p> <p>Collaboration and a team ethos where we work together to achieve our goals and keep our pupils safe</p> <p>Relationships built on mutual dignity and respect, in an inclusive environment where difference is valued and debate and discussion encouraged</p> <p>Guidance and training available for staff and managers to enable them to look after themselves and each other, reach out and connect and spot the potential warning signs of stress/mental health concerns</p>
Financial Wellbeing	<p>Fair and transparent remuneration practices (e.g. Pay Policy) (https://www.theeducationalliance.org.uk/trust-policies/)</p> <p>Various options for paid leave (e.g. special leave/medical appointments)</p> <p>Pay rates above the national living wage</p> <p>Briefings for staff considering/preparing for retirement</p> <p>Range of resources, including debt management and budget planning (e.g. on the EAP website)</p> <p>Salary Finance – offer reasonable rates for loans facilitated through the Payroll Team</p> <p>Flexible working requests encouraged to support phasing into retirement/managing changing home life circumstances</p> <p>Vacancies advertised internally, providing staff with opportunities for career development (https://www.theeducationalliance.org.uk/vacancies/)</p> <p>Financial advisors provide free briefings for staff on a regular basis</p> <p>Pension schemes and information readily accessible for teaching and non-teaching staff</p>

RETURN TO WORK DISCUSSIONS – A QUICK GUIDE FOR MANAGERS

Before the meeting

- Try to ensure the return to work discussion is held as soon as practicable, ideally during the first day of their return to work
- Ideally the return to work discussion should take place face to face, but if employees work across sites, a telephone call is better on the first day of return rather than delaying until the next time you meet.
- Have they been absent due to long/short term absence? If long-term, make sure you have a chat with HR about any possible restrictions/adaptations/phased return
- Is there an underlying medical issue resulting in recent absence?
- Do you think there is anything we can do to support the employee in maintaining a good attendance record and returning back to work? (Contact HR if you require any help)
- Is there anything else you are aware of that could be affecting the employee's ability to attend work?
- Is a pattern emerging? If so, contact HR for advice.
- Ensure you have a safe, confidential space for the discussion to take place (remember employee medical information is sensitive and confidential)

During the meeting

- Welcome the employee back to work and check that they are recovered and well enough to return to work
- Keep the discussion relaxed and informal, and give them space to talk
- Consider with the employee any additional support they may require
- Do they required any temporary/permanent changes/adjustments? Explore the operational feasibility of such changes, where applicable.

If you have any queries about the return to work discussion, the triggers, stages or any other conditions provisions of the Health and Wellbeing Policy please contact your HR team.

Injury at Work – Guidance

All employees who sustain an injury or contract a disease as a result of carrying out their work, and suffer a reduction in their remuneration, are entitled to an allowance while the reduction continues. The Burgundy Book for teachers and the Green Book for associate staff provide further guidance, and the HR Department will be able to provide managers and staff with further information and guidance should they require it.

As soon as an employee reports that they are unfit to work as a result of an injury or disease sustained or contracted as a result of anything they were required to do in carrying out their work, consideration should be given to possible qualification for injury allowance.

Neither completion of the accident/disease reporting forms nor the payment of an injury allowance is an admission of liability in the event of a common law claim for damages. Injury allowances are paid under a contractual commitment, not as compensation.

When the employee has reported unfit to work as a result of an injury or disease sustained or contracted as a result of anything they were required to do in carrying out their work, the manager should contact the HR team, who will contact the employee to undertake a wellbeing check and to seek consent for an Occupational Health referral.

An employee who is seeking to claim damages which may be receivable from a third party may be given an advance of a sum not exceeding the sickness allowance detailed above, subject to the employee undertaking to refund to the trust the total amount of such allowances or the proportion thereof represented in the amount of damages received. The refund will be based on the net allowance paid to the employee after the deduction of income tax and national insurance contributions.

The HR Department, in determining the value of the allowance, will seek from the employee details of other benefits which may become payable as a result of the accident or contracting a disease and such benefits/payments may be deducted from any allowance.

Disability Considerations

Under the Equality Act, 2010, a person has a disability if:

- they have a physical or mental impairment
- the impairment has a substantial and long-term adverse effect on their ability to perform normal day-to-day activities

For the purposes of the Act, these words have the following meanings:

- 'substantial' means more than minor or trivial
- 'long-term' means that the effect of the impairment has lasted or is likely to last for at least twelve months (there are special rules covering recurring or fluctuating conditions)
- 'normal day-to-day activities' include everyday things like eating, washing, walking and going shopping

People who have had a disability in the past that meets this definition are also protected by the Act. There are additional provisions relating to people with progressive conditions. People with HIV, cancer or multiple sclerosis are protected by the Act from the point of diagnosis. Some conditions are specifically excluded from being covered by the disability definition, such as addictions to non-prescribed substances.

Employees who have a disability may require 'reasonable adjustments' as dictated by the disability discrimination provisions of the Equality Act, 2010, to enable them to continue to work effectively in their role. The types of adjustments that the Trust might be required to consider include:

- making physical adjustments to the workplace
- allocating some of the disabled person's duties to another person
- altering the disabled person's working hours through, for example, part-time working, job sharing or other flexible hours arrangements
- providing special equipment to assist the disabled person to perform his or her tasks and giving training in the use of the equipment
- transferring the disabled person to a suitable vacant post with or without reasonable adjustments being made
- consideration of disability related absence used for absence review points, which may be viewed as a reasonable adjustment

Considerations relating to potential reasonable adjustments may include the following:

- The cost of the adjustment and available organisational resources, exploring external sources of assistance, such as Access to Work
- The practicality of the adjustment
- The efficacy of the adjustment in preventing the disadvantage (does the adjustment remove the disadvantage?)
- The disruption to business and the effect on others caused by the adjustment
- Health and safety considerations

Manager's Guide to Sickness Meetings

The purpose of a sickness meeting is to:

- Explore and establish with the employee any underlying problems, which may be affecting their health and wellbeing, giving rise to high levels of absence and consider any actions the employee has taken to improve their health and wellbeing and attendance
- Determine any need for specific medical advice (e.g. a referral to the Occupational Health Department)
- Explore any actions, which may assist the employee in improving and maintaining a good level of health and wellbeing
- Discuss and agree any support or intervention that may assist the employee in improving their health and wellbeing and attendance at work
- Establish an improvement plan and a subsequent review meeting within three months of the date of the meeting. The meeting may be brought forward if further absence occurs within the review period
- Establish whether there are any possible disability implications as defined under the Equality Act, 2010, and any reasonable adjustments, which may be considered to assist the employee in managing their disability and their work more effectively

The HR team will support managers to ensure a letter is sent to the employee following a sickness meeting, detailing the key points of the discussion, any agreed actions, support or intervention, a date for a review meeting and clarification of the review period, alongside details of the EAP.

Managers must approach sickness meetings with care and sensitivity, seeking to develop their understanding of the employee's health and wellbeing, encouraging engagement, listening and enabling the employee to share details that may assist in the management and improvement of the employee's attendance and health and wellbeing. Managers are advised to prepare well for the meeting. Preparation may include arranging a suitable time and place for the discussion, ensuring the employee understands the purpose and scope of the meeting, and that the employee is aware they can bring a trade union or work colleague to the meeting. Preparing for the meeting allows any misunderstandings to be clarified before the meeting takes place, and it ensures that the employee understands what is happening. Managers are encouraged to prepare for the meeting with the HR Department, ensuring any medical advice received has been shared and understood. Any advice regarding restrictions and reasonable adjustments can be explored from an operational feasibility perspective prior to the meeting, which again allows a more constructive meeting to take place.

At the meeting, appropriate actions may be agreed, with the aim of supporting the employee to improve their attendance levels and their health and wellbeing. Whilst managers are encouraged to support employees, the Trust also recognises that the employee should experience a joint discussion, rather than feeling something is being done to them. It is therefore useful for employees to also prepare in advance of meetings, with their trade union or work colleague, to consider what they might need to do or request to enable satisfactory improvements to be made. Employees are encouraged to consider what they are willing to share, and the potential impact of not sharing information. Normally, a review date of three months at the most will be established, which may be pulled forward if further absence occurs during the review period.

The employee will be advised of the need for improvements, and that whilst the aim is to support improvements, it is recognised that where improvements are not made, eventually, the individual's employment may be at risk.

If an employee is unable to improve their attendance, and their attendance continues to effect pupil learning, service delivery, and the health and wellbeing of colleagues, it may be necessary for dismissal to be considered. If the Trust has considered all other options and discussions have failed to result in significant and sustained improvements, a meeting may be arranged to consider the potential dismissal of an employee. The Scheme of Delegation details the make-up of the panel.

A senior manager will present the report at the meeting, accompanied by a HR colleague, and the employee and their trade union representative (or work colleague if they are not in a trade union) can ask questions and can also present information. Any information the employee and/or their trade union wish to present should be sent to the HR Department prior to the meeting, to enable HR colleagues to share the information with the panel. The management report and information pack presented by a member of the management team should include the following:

- the employee's absence history, including any improvements made
- the actions that have been taken so far to help the employee achieve a satisfactory level of attendance and the impact of those actions
- the impact of continued absence levels on students/service provision/other staff
- medical advice received and actions associated with said advice
- options that have or have not been considered as an alternative to dismissal (e.g. redeployment, reasonable adjustments)
- the likelihood of a return to work in the foreseeable future
- the potential for ill-health retirement to be considered an option

The employee and their trade union or work colleague attend to present information regarding the absence/attendance levels, actions taken to support them (e.g. exploration of reasonable adjustments, either temporarily or permanently, or redeployment) and present any additional relevant information. If the employee fails to attend the meeting, any written submissions or representations made on their behalf by their trade union representative or work colleague shall be considered by the panel. If the employee requests the meeting be rescheduled, the Trust will endeavour to reschedule the meeting. Continued requests to reschedule, or failure to attend without prior notification, will result in a decision being made in the employee's absence.

Where the panel believes that options open to the Trust have not been adequately considered, they may decide to extend the review period, establishing appropriate actions which will form part of an improvement or rehabilitation plan, with a review date of three months at the most being established. Alternatively, they may seek an adjournment to consider the case, and if additional information is required, they will reconvene the meeting and share the information with the employee and their representative.

If the panel believes that the Trust has exhausted all options and where available information indicates that it is likely that the sickness absence issues will continue, the panel may decide to dismiss the employee, with notice. Depending on the circumstances of the case, this could be a dismissal on the grounds of ill-health capability or ill-health retirement.

Long Term Absence

The line manager will normally arrange monthly review meetings with the employee if possible and appropriate, with HR advice, to ensure that there is regular contact with the employee, and that their absence is continuously reviewed. The manager should agree with the employee the mode and frequency of contact, to ensure it works for both parties. Regular meetings enable the manager, HR and the employee (with their representative if they have one) to discuss and explore various options within this procedure within the context of the illness (e.g. that they are receiving appropriate support and that rehabilitation plans and structured return to work plans are discussed where appropriate). Meetings may take place at a mutually acceptable location, or via the telephone, where meeting is not possible.

The manager, in conjunction with the employee, the Occupational Health Department, the HR representative and the trade union representative (where applicable), must:

- Establish the current position regarding the employee's condition and treatment
- Consider any medical issues or underlying causes that require further investigation
- Consider possible disability implications as defined under the Equality Act, 2010 and possible associated restrictions/reasonable adjustments (with advice from the Occupational Health Department)
- Consider any future implications (e.g. is the condition likely to recur and how might this be effectively managed at work)
- Ensure the employee has been offered and received appropriate support (and check if this has made a difference for the employee in improving their health and wellbeing)
- Consider a rehabilitation programme in conjunction with the Occupational Health Department
- Consider, with advice from the Occupational Health Department, possibilities for redeployment into suitable alternative employment
- Consider whether ill-health/early retirement might be an option for the employee and the Trust to consider
- Consideration of other external agencies and schemes, which may provide further assistance, such as Access to Work

Redeployment into suitable alternative employment may be considered, with or without adjustments. There is no obligation to create a job, but redeployment may be a consideration for staff unable to return to their substantive role.

Final review meeting

In cases of long term sickness absence, the employee may be subject to a potential dismissal meeting as per the Scheme of Delegation once all other options have been exhausted.

In such circumstances, the Trust will:

- Review the employee's sickness absence record and the likelihood of a return to work in the foreseeable future, to assess whether or not it is sufficient to justify dismissal
- Consult with the employee
- Obtain up-to-date medical advice, where possible
- Advise the employee verbally and in writing as soon as it is established that dismissal may be a possibility
- Meet with the employee to discuss the options and consider the employee's views on continuing employment

- Review if there are any redeployment opportunities
- Consider recommendations for dismissal on the grounds of ill-health capability
- Ensure the employee is treated reasonably, with dignity and respect throughout the process

Where an employee is suffering from a terminal illness, the matter will be managed in a caring and sensitive manner. The manager alongside the HR representative, the trade union (where applicable) and the Occupational Health Department will work closely to consider the best interests of the employee. They will ensure that appropriate support, advice and guidance are available for the employee, and the employee's family.

If the employee is dismissed on the grounds of ill-health capability, they will have a right of appeal. The Scheme of Delegation advises that panel members must not have not been involved in the decision to dismiss the employee and an HR representative.

When an employee returns to work following a long-term absence, they will normally meet with their manager, HR and their trade union representative or a work colleague, to ensure that their return to work is managed effectively, with risk assessments undertaken where appropriate, wellness action plans completed and or/reviewed and monitoring meetings and processes discussed and understood by all. If, once an employee has returned to work after a period of long-term sickness absence, they are absent again for a short term period, a discussion with the employee will take place to establish whether the absence relates to the health condition that had previously resulted in long-term absence, whether there are any workplace triggers that require further consideration and any additional support or action they employee or the organisation can undertake to reduce the risk of further absence occurring.

STRESS AT WORK GUIDE

The HSE's 'Work-related stress, anxiety or depression statistics in Great Britain 2021' advises that 822,000 workers suffered from work-related stress, depression or anxiety in 2020/21. The report also advises that stress, depression or anxiety is most prevalent in Education and Human Health and Social Work. Main contributing factors cited were workload pressures, including tight deadlines, too much responsibility and a lack of management support. Education Support undertakes an annual teacher wellbeing index and they surveyed 3,000 staff in 2021. 77% of respondents said they had experienced symptoms of poor mental health due to work; 72% said they had experienced stress (this rose to 84% for senior leaders); 42% said they believed their organisation's culture had a negative impact on their wellbeing and; 54% said they had considered leaving the sector in the past 2 years due to the pressures on their mental health.

The Trust is mindful that not all absence due to mental health issues is reported as such; therefore, it is likely that the actual figures are even higher than reported. The Trust has a number of activities ongoing to improve health and wellbeing in our schools, including the Whole School Approach, which considers the needs of students, staff and parents/carers, increasing capacity and support in our schools; Be Well Champions to make changes in their schools to support colleagues and reduce the stigma attached to mental health issues; Adult Mental Health First Aiders; and the EAP is a service that is free to staff and they can access it 24 hours a day, 7 days a week. Education Support also offers counselling, financial assistance and resources for all staff working in the education sector and this is free for them to use. The HR Department also has a number of resources for staff to access when they need it, including signposting information.

Under the Health and Safety at Work Act 1974 and the Management of Health and Safety at Work Regulations 1999, employers are required to undertake risk assessments for health hazards at work and to take appropriate action to address the risk. Stress is defined as a health hazard at work, and the Trust has Wellness Action Plans and Risk Assessment templates for managers and staff to use to enable risks to be discussed and managed effectively.

Work place stress is defined by the Health and Safety Executive as 'the adverse reaction people have to excessive pressures or other types of demand placed on them at work'. Work related stress occurs when an employee is unable to cope with the demands placed on them. Stress at home can also result in stress reactions at work and stress can be an underlying cause for many illnesses, such as anxiety, depression, heart disease, back pain, headaches, gastrointestinal illnesses and alcohol and drug dependency. The Trust recognises that staff may experience pressure at work, and it aims to reduce the risk of work-related stress through the following interventions:

- Ensuring jobs are appropriately designed and that staff have access to appropriate training to enable them to perform to a high level at work
- Involving staff in decisions that affect them wherever possible
- Providing staff with opportunities to seek support when they need it (e.g. through the Employee Assistance Programme/Education Support/Occupational Health)
- Ensuring employment related policies and procedures are fair, consistent and reasonable
- Enabling staff to settle into new roles well by having an effective induction process and reviewing training needs when staff move into new roles
- Planning changes and ensuring staff are consulted appropriately wherever possible
- Encouraging teamwork to enable talented individuals to share and utilise their knowledge, skills and strengths

- Access to a range of flexible learning opportunities, such as health and wellbeing webinars and online learning sessions.
- Ensuring any relationship issues at work are addressed quickly, sensitively and effectively, utilising informal methods, such as mediation, wherever possible, enabling staff to resolve issues together in a constructive, supportive way.
 - Ensuring the ethical leadership framework is implemented effectively throughout the organisation.

Stress management is included in the management of sickness absence, including the consideration of reasonable adjustments. The Trust will ensure that managers have access to appropriate training, guidance and support to provide them with greater insight into the potential triggers for stress at work, the way in which those triggers can be minimised and the possible signs or symptoms of stress. This greater awareness should provide managers with the ability to discuss any concerns they may have with employees at an early stage rather than waiting for a crisis to emerge. Managers may notice a change in an individual's behaviour, such as worsening relationships with others, indecisiveness, absenteeism, inability to delegate, general deterioration, withdrawal or a change in their demeanour. The EAP has a variety of tools, techniques, advice and guidance in relation to stress and stress management. Managers and staff are encouraged to utilise wellness action plans, to enable joint consideration of issues, potential triggers, signs and symptoms to be shared, resulting in agreed support and intervention strategies being established.