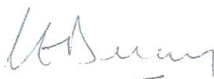




Sickness Absence Policy and Procedure

Signed:	
Chair of Trust Board:	Claire Delaney
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1 Bellevue Place Education Trust – Our commitment

Learn, Enjoy, Succeed

BPET is a growing family of autonomous schools that strive for excellence for the communities they serve. Our staff are empowered to balance academic rigour and curricular breadth to inspire confidence, creativity and respect. Our pupils are at the heart of everything we do as to LEARN, ENJOY and SUCCEED.

LEARN

We offer a breadth and ambition of provision that supports an exceptional academic education, nurturing every child's learning journey – regardless of ability, background or special educational needs – and helping them develop a lifelong passion for learning.

ENJOY

We believe learning should be enjoyable, and that through this enjoyment children develop life-long learning habits. We achieve this by creating opportunities for all children to reach their full potential at school, and to enjoy school life – helping to ensure pupils grow into happy, independent and confident learners.

SUCCEED

We strive for excellence, aiming to ignite ambition, aspiration, pride and a desire to contribute to society. We prepare our pupils to approach life with confidence, purpose and integrity.

Working together: the BPET way

We achieve far more by learning, supporting and collaborating within and across our network of schools and communities. We do so with an unwavering and shared commitment to equality, diversity, inclusion, and respect.

2 Introduction

- 2.1 At BPET, we are committed to fostering a positive, supportive working environment. When employees are absent from work due to sickness, they must be treated with empathy, dignity, and respect. Headteachers and line managers play a vital role in supporting staff through periods of ill health, making every reasonable effort to aid their recovery and facilitate a smooth return to work. However, the needs of the individual must be balanced carefully with the operational requirements of the school, BPET, and the pupils we serve.
- 2.2 This policy outlines our procedures for reporting and managing sickness absence in a fair, consistent, and transparent manner. We recognise that sickness absence may range from short-term, intermittent periods of ill health to long-term or recurring conditions, each with different underlying causes, such as injury, ongoing health issues, or serious illness requiring extended treatment.
- 2.3 It is our intention to understand the reasons for sickness absence in each case and to investigate where appropriate. Where necessary and reasonably practicable, we will implement supportive measures to assist employees in returning to work.
- 2.4 This policy does not form part of any employee's contract of employment and may be amended at any time following appropriate consultation. However, it should be read alongside the terms and conditions set out in individual contracts of employment. We may also vary the procedures outlined in this policy, including any timeframes, where appropriate to individual circumstances.
- 2.5 In implementing this policy, BPET will collect, process, and store personal and special

category data in accordance with our Data Protection Policy. We are committed to complying with all relevant data protection legislation, including the UK General Data Protection Regulation and the Data Protection Act 2018, as amended or updated. Records will be managed in line with our Staff Privacy Notice, Information and Records Retention Policy, and all statutory requirements relating to the handling of personal data.

3 Scope and purpose

- 3.1 This policy applies to all employees of BPET, at all levels and grades, including teaching and support staff, regardless of their employment status, unless otherwise stated (for example, employees in their probationary period may be subject to alternative arrangements). This policy does not apply to contractors, consultants, agency workers or any self-employed individuals working for us.
- 3.2 The purpose of this policy is to outline the BPET's expectations regarding attendance at work, and to ensure that sickness absence is managed appropriately, consistently and fairly. In doing so, we aim to promote the well-being of our staff, support timely returns to work, and minimise the impact of absence on pupils, colleagues and school operations.
- 3.3 All employees are accountable for maintaining acceptable attendance levels and engaging with this policy, including its procedures for reporting absence and participating in return-to-work processes. Headteachers, operations managers and line managers are accountable for applying this policy consistently and compassionately, and for providing appropriate support and interventions.
- 3.4 For the purposes of this policy, all references to 'working days' mean actual school days for term-time only staff, or contractual working days for year-round staff.

4 Governance Responsibilities and Roles

Bellevue Place Education Trust (BPET) has a duty of care to all its employees and is committed to managing sickness absence with empathy, fairness and consistency. The Chief Executive or their representative may implement this policy and procedures for staff employed within BPET schools, where appropriate.

Occupational Health advice may be sought at any stage of the absence management process where there is a cause for concern or where further support and guidance is needed.

4.1 Roles

- 4.1.1 All line managers (including Headteachers) are responsible for ensuring that staff are familiar with the expectations placed upon them in relation to attendance, monitoring absence consistently, ensuring reporting procedures are followed, and conducting informal and formal meetings with individuals in accordance with the various stages outlined in this procedure. Line managers are empowered to issue warnings up to and including a final written warning; however, this must be done in consultation with a member of the senior leadership team or above.

- 4.1.2 The Central Team (including the Director of Education, Executive Headteachers, and other senior staff) will have their absence management overseen by the Chief Executive.

4.2 Employee Responsibilities

- 4.2.1 All employees are expected to comply with the reporting and certification procedures outlined in this policy and to take responsibility for maintaining their health and wellbeing to support good attendance.

5 Disabilities

- 5.1 We recognise that sickness absence may result from a disability. At each stage of the sickness absence meetings procedure, particular consideration will be given to whether reasonable adjustments can be made to the requirements of a job or other aspects of working arrangements. These adjustments aim to provide support at work and/or assist with a return to work where needed.
- 5.2 Reasonable adjustments will be considered on an individual basis, taking into account the operational needs of the role, financial viability, and the practicality of implementation, while fully complying with the provisions of employment law.
- 5.3 In some cases, an Occupational Health (OH) referral may be necessary to ensure that the required adjustments are suitable and effective. Employees may also be asked to provide supporting medical documentation or a doctor's note to confirm the nature of their disability and how it affects their work. This will help ensure that any adjustments made are appropriate and align with the employee's needs.
- 5.4 If you believe you are affected by a disability or any medical condition that impacts your ability to undertake your work, you should inform your line manager at the earliest opportunity. This will allow for the timely consideration of adjustments that can be made to support you in your role.

6 Reporting Procedures

- 6.1 It is essential that all staff members follow the prescribed procedure for reporting sickness absence. Failure to adhere to this procedure on a consistent basis may result in disciplinary action being initiated by the relevant manager or senior leader.
- 6.2 In instances where an employee provides false evidence of incapacity, fails to notify their absence, or does not provide a valid reason for their absence, such behaviour will be addressed through the BPET Disciplinary Procedure.
- 6.3 In some cases, an employee may not be meeting the expected standards of work, whether in terms of attendance, conduct, or performance. When this occurs, unsatisfactory attendance may be reviewed alongside conduct or performance issues in a joint formal meeting. This approach aims to avoid the complexity of parallel procedures with overlapping stages and potential outcomes, ensuring a more efficient and cohesive resolution to the employee's overall concerns.

7 Sickness absence reporting procedure

All employees are required to follow the reporting procedure set out below.

- 7.1 If you are taken ill or injured while at work, you must immediately inform your line manager or Headteacher (for school-based employees), or a member of the Senior Management Team (SMT) for Central Team employees. Managers should make arrangements for any employee who is unwell to be accompanied home and/or to receive medical treatment if necessary.
- 7.2 If you are unable to attend work due to illness or injury, you are expected to contact [your line manager or relevant position] as early as possible and no later than 07:00 am. The following details should be provided:
 - The nature of your illness or injury.
 - The anticipated duration of your absence.
 - Your current contact details.
 - Any urgent or outstanding work that requires attention, including coverage for student work if applicable.
- 7.3 Please note that contacting via text message or email alone is not acceptable. A phone call must follow the initial communication to ensure direct contact is made.
- 7.4 In exceptional cases, where prior approval has been granted by the Headteacher, staff may send an early message before 07:00 am to activate the cover process. However, a follow-up phone call must always be made by 07:30am to confirm details and ensure the employee's wellbeing. Every employee who is absent must speak directly with someone to ensure effective communication.
- 7.5 Managers should ensure that:
 - 7.5.1 All reported sickness absences are recorded, and the Operations Manager must be notified. This includes absences of the Headteacher and/or Senior Management Team (SMT) members
 - 7.5.2 Necessary arrangements are made to cover work and that colleagues are notified, while maintaining confidentiality.
 - 7.5.3 They make contact with the employee during their absence to inquire after their health and, where possible, confirm the expected return date.
- 7.6 If you are ill or injured during a period of pre-approved annual leave, you may choose to treat the affected days as sickness absence instead of annual leave. You must notify your manager of your condition and its likely duration as soon as possible, even if you are abroad. The usual self-certification and medical certificate requirements outlined in this policy will apply.
- 7.7 To ensure we are doing all we are able to in order to support pregnant employees, a pregnant employee will be asked to attend a return-to-work interview when returning to work after any period of absence. However, any sickness absence by a pregnant employee for a pregnancy-related reason will not be taken into account when checking if the need for formal action under our sickness absence management procedure has been triggered.

8 Evidence of incapacity

- 8.1 For sickness absence of up to seven calendar days, you are required to complete a self-certification form, which is available from the Operations Manager.
- 8.2 For sickness absence exceeding seven calendar days, you must provide a Statement of Fitness for Work (a "Fit Note") from an eligible healthcare professional confirming that you are not fit to work and outlining the reasons for your absence. This certificate must be forwarded to your line manager as soon as possible. If your absence continues, further medical certificates must be provided to cover the entire period of absence.
- 8.3 If your healthcare professional provides a certificate stating that you 'may be fit for work' you should inform your line manager immediately. We will discuss with you any additional measures that may be needed to facilitate your return to work, taking into account your healthcare professional's advice. This may take place at a return-to-work interview (see paragraph 14). If appropriate measures cannot be taken, you will remain on sick leave and we will set a date to review the situation.
- 8.4 In cases where there are concerns about the reasons for absence or instances of frequent short-term absence, we may require a medical certificate for each absence, regardless of its duration. If this is the case, we will cover the costs incurred in obtaining such medical certificates for absences of a week or less, upon production of a doctor's invoice.
- 8.5 If you are absent immediately prior to a school closure period (e.g., holidays), you will continue to be recorded as absent for the purposes of sickness absence and statutory/contractual sick pay during the school closure period, unless you provide a fit note indicating you are fit to return to work. BPET will cover the cost of obtaining a fit note if applicable.
- 8.6 For elective or cosmetic surgery or procedures that result in your absence from work, any entitlement to sick pay (as outlined in Section 8) will be subject to satisfactory medical evidence. This must be in the form of a report from your doctor or a specialist confirming that the procedure is being undertaken on medical advice. You may be required to use annual leave for any absence related to an elective procedure.
- 8.7 Where absence appears to be as a result of an infectious disease BPET reserves the right to obtain medical evidence to ascertain whether the infection was directly attributable to the workplace.
- 8.8 On occasion, an employee may not be meeting the required standards of work in terms of attendance, conduct, or performance. In such cases, unsatisfactory attendance may be considered in conjunction with conduct or performance issues during a joint formal meeting. This approach aims to avoid the complexity of initiating separate procedures with similar stages and potential outcomes.

9 Unauthorised absence

- 9.1 Cases of unauthorised absence will be dealt with under our Disciplinary Procedure.
- 9.2 Absences that have not been notified according to the sickness absence reporting procedure will be treated as unauthorised. In such cases, you may be subject to disciplinary action and your pay may be suspended until the absence is properly accounted for.
- 9.3 If you fail to report for work and have not contacted your line manager to explain the reason for your absence, your line manager, Operations Manager, or Head of People will

make reasonable attempts to contact you, both by telephone and in writing if necessary. However, this should not be regarded as a substitute for following the correct procedure for reporting sickness absence.

10 Sick pay

- 10.1 You should refer to your contract of employment for details of the sick pay to which you are entitled. This policy should be read in conjunction with the terms and conditions outlined in your individual contract of employment. In some cases, we may vary the procedures set out in this policy, including timeframes, where individual circumstances warrant.
- 10.2 Failure to properly report your absence, or to provide the required medical or self-certification, could result in your pay being suspended. Absences that have not been properly notified according to the sickness absence reporting procedure will be treated as unauthorised absence.
- 10.3 Where an employee does not reasonably engage with the sickness absence management process, including attending occupational health appointments, maintaining communication, or participating in review meetings without valid reason, BPET reserves the right to withhold contractual sick pay, subject to a fair process and in line with the terms of your contract of employment. In certain cases, where there is ongoing failure to cooperate, this may also result in disciplinary action.

11 Ongoing Contact and Occupational Health Referrals

- 11.1 During periods of sickness absence, you should expect to be contacted at appropriate intervals by the relevant manager or senior leader. The purpose of this contact is to offer support, discuss your wellbeing, understand the likely duration of your absence, and identify any work-related matters that may require attention. This communication is intended to be supportive and proportionate. It is the joint responsibility of both the line manager and the employee to maintain contact.
- 11.2 If you have any concerns while absent from work, whether related to your health, the reason for your absence, or your ability to return to work, you are encouraged to contact your Line Manager at any time.
- 11.3 Confidential counselling is available to all employees through the Employee Assistance Programme. Information can be provided by your line manager, operations manager and SMT.
- 11.4 Medical examinations and Occupational Health
 - 11.4.1 We may, at any point during the application of this policy, request that you attend a medical examination with our Occupational Health provider and/or a doctor appointed by BPET. This will be at BPET's expense. You may be asked to consent to the sharing of any resulting medical reports with us. These reports may be discussed with relevant managers, our medical advisers, and the referring clinician in order to inform next steps.
 - 11.4.2 Refusal to reasonably cooperate with this process, including failure to attend Occupational Health appointments or to provide necessary medical information,

may result in employment decisions being made without the benefit of medical advice. In certain cases, this may also lead to disciplinary action.

11.4.3 In situations where there is a conflict between the opinion of your GP or other treating clinician and the assessment provided by BPET's Occupational Health advisers, for example, regarding your fitness for work or whether there is an underlying medical condition contributing to ongoing absences, the opinion of the Occupational Health advisor will usually take precedence. In some instances, BPET may seek a further independent medical opinion to assist in resolving the matter.

11.4.4 All medical information and special category data will be handled in accordance with our Staff Privacy Notice, which outlines how we collect, process, and store employee data in line with data protection legislation.

12 Dental, Doctor, and Hospital Appointments

12.1 Employees are expected to schedule medical, dental, or hospital appointments in a way that minimises disruption to their working day. Wherever possible, appointments should be arranged outside of core working hours, such as at the start or end of the day. Where this is not feasible, staff are encouraged to make up the time lost, in agreement with their line manager. An official evidence of an appointment must accompany requests for time off for dental and hospital appointments. Appointments should always be made in order to ensure minimal disruption to attendance at work.

12.2 Employees are encouraged to attend appointments before the start or at the end of the working day. Where this is not possible they should attempt to make up the equivalent of the time they have been absent from duty. Requests for time off during the working day should be supported by an official appointment card or evidence of the scheduled appointment. This should be submitted to the line manager in advance of the appointment wherever possible.

12.3 If an employee requires a series of appointments for ongoing treatment, they should inform their line manager as soon as possible so that appropriate arrangements can be made. Where relevant, such absences may be recorded as sickness absence and managed under the provisions of this policy. Where an employee needs to attend a series of appointments for on-going treatment, the manager should be told about the arrangements as soon as possible. If appropriate, the absence should be recorded as sickness absence and dealt with within these procedures.

12.4 A clear record will be maintained of all instances where an employee arrives late or leaves early due to medical or dental appointments. Staff are required to notify their line manager of any such instances, and managers will monitor these records to ensure that attendance expectations are being met. A record will be kept at the times a member of staff arrives at school late or leaves early due to medical/dental appointments. Members of staff are required to inform their manager and a record will be kept when a member of staff leaves the school early or when they return late. The Manager will monitor this record.

- 12.5 If an employee is attending hospital appointments for cancer treatment or cervical screening treatments, and the appointment can't be made outside of the working day, then the time off will be paid.

13 Recording Absences

- 13.1 Absences prior to completing half of the working day (before 12:00) will be recorded as a half-day's sickness absence.
- 13.2 The sickness absence reporting procedure applies equally to all staff, including those off-site when they fall ill, for example, during a school journey, residential trip, or attendance at an external training event or annual conference. In such cases, staff must follow the same process for reporting absence as if they were on-site.
- 13.3 For part-time and job-share staff who work fewer than five days per week or have variable working hours, all sickness absence will be calculated on a pro-rata basis. This will apply both to the recording of absence and the manager's monthly review of attendance. In line with standard practice, Saturdays and Sundays are included in the calculation of sickness periods where the absence is continuous.
- 13.4 Employees should use this policy in conjunction with the terms and conditions set out in their contract of employment. It is important to note that sickness absence is recorded in calendar days, not working days, and for absence management purposes:
- Teachers: Sickness is recorded from 01 September each year.
 - Support staff: Sickness absence is tracked on a rolling 12-month basis from the first day of absence.
- 13.5 Sick pay entitlements will not exceed normal pay and will be applied on a pro-rata basis where applicable. All staff must be certified as fit to return to work prior to the start of any holiday period to ensure entitlement to sick pay is not affected.
- 13.6 BPET reserves the right to terminate employment on medical grounds before the full entitlement to occupational sick pay is exhausted, where this is supported by appropriate medical evidence and following a fair and thorough process.

14 Return-to-work interviews

- 14.1 Following any period of sickness absence, a return-to-work interview will be arranged with your line manager or another appropriate member of staff.

This meeting provides an opportunity to:

- Confirm the reason and duration of your absence
- Ensure you are well enough to resume your duties
- Address any concerns or support needs you may have
- Discuss any underlying issues that may have contributed to your absence

- Identify any adjustments or phased return plans that may be appropriate
- 14.2 Where a Fit Note indicates that you 'may be fit for work', the return-to-work interview will also serve to explore any recommendations made by your healthcare provider. We will consider reasonable adjustments or supportive measures that may help facilitate your successful return to work.
- 14.3 Return-to-work interviews are an important part of BPET's commitment to wellbeing, early intervention, and maintaining consistent attendance across the Trust.

15 Returning to work from long-term sickness absence

- 15.1 We are committed to supporting employees in returning to work following a period of long-term sickness absence. In line with our absence management procedures, and where appropriate and feasible, we will consider supportive measures to facilitate a safe and sustainable return to work. These may include:
- 15.1.1 Obtaining medical advice, including from Occupational Health or a treating clinician, to help inform appropriate next steps.
 - 15.1.2 Making reasonable adjustments to the workplace, duties, working practices or hours. This may include a phased return to work for a time-limited period. Reasonable adjustments will be considered in the context of the operational needs of the school and BPET and the financial, resourcing and education implications. All decisions will be made in a fair and consistent manner, with regard to the employee's individual circumstances and the provisions of the Equality Act 2010, where applicable.
 - 15.1.3 Implementing a phased return to work, which is often recommended by a GP or Occupational Health Advisor. During a phased return (normally up to a maximum of four weeks), employees will continue to receive full contractual pay, unless alternative arrangements are agreed. If a longer period of phased return is requested, this may require a temporary contractual change to reflect reduced working hours, with a corresponding adjustment to pay. Any such arrangements will be discussed and confirmed in writing.
 - 15.1.4 Exploring redeployment opportunities within the school or BPET, where this is in the interests of both the employee and the organisation. Employees will receive their full pay on the phased return. Phased returns to work should be for a maximum of 4 weeks. In the event an employee requests that the phased return is extended beyond 4 weeks, a dialogue should be held with the employee in regard to a temporary contractual change being made to their working hours to accommodate the request and their pay adjusted accordingly.
 - 15.1.5 Developing a personalised return-to-work plan, agreed between the employee, line manager, and relevant parties, to ensure a smooth transition back to work. Considering redeployment to another role within the School or BPET; and/or
 - 15.1.6 Agreeing a return-to-work programme with everyone affected.
 - 15.1.7 Where a return to work is not possible in the longer term, we will sensitively explore any entitlements under the employee's contract and, where applicable, any provisions of insurance or ill-health retirement schemes. If you are unable to return

to work in the longer term, we will consider whether you are entitled to any benefits under your contract and/or any insurance schemes we operate.

16 Sick leave and Annual Leave

- 16.1 If you become unwell or are injured during a period of annual leave and are unable to work, you may request that the relevant period is recorded as sickness absence rather than annual leave. In order to consider this, you must notify your line manager and/or the Operations Manager without delay and provide appropriate medical evidence in line with the requirements set out in this policy. This applies even if the illness or injury occurs while you are abroad.
- 16.2 If you are already on sick leave and have a period of pre-booked annual leave during that time, you may request to cancel the annual leave and retain the entitlement for future use. Any such request should be made to your line manager as soon as possible.
- 16.3 In circumstances where a period of sick leave continues into the next annual leave year, or where it is not reasonably practicable to take any accrued leave within the current leave year, you may carry forward a maximum of 20 days (pro-rated for part-time employees). This carried-over leave must normally be used within three months of your return to work, unless an extension is agreed in exceptional circumstances.
- 16.4 All requests and decisions relating to annual leave during or following sickness absence will be considered in line with operational needs and treated fairly and consistently.

17 Terminal illness

- 17.1 Where an employee is suffering from a terminal illness, we will endeavour as far as possible to accommodate their wishes and to provide additional support where feasible. This includes discussion of the possibility of ill-health retirement or facilitating conversations with the relevant pension scheme.
- 17.2 While we will support employees who wish to continue working, employees with a terminal illness should bear in mind that there may come a time when they will be unable to continue working. In this case, the employee's line manager will discuss the options with the employee, with the support of the Head of People.
- 17.3 The employee's line manager will talk to the employee about whether to inform their colleagues, and if so, when and how to do so with the employee's permission.
- 17.4 BPET has an employee assistance programme to assist during this difficult time.

18 Records and Documentation

- 18.1 Absence returns showing all instances of sickness must be submitted promptly to the payroll provider. Each episode of sickness absence will be recorded in the employee's HR system, which is maintained by the Operations Manager or designated Administrative Assistant.

- 18.2 The Operations Manager is responsible for notifying the payroll provider when an employee is due to move onto half or nil pay, or has exhausted their sick pay entitlement, as outlined in Appendix 4.
- 18.3 It is imperative that the employee is informed in good time of any upcoming change to their pay. The relevant manager or senior leader must ensure that this communication takes place as early as possible, allowing the employee to prepare for any financial impact. This also helps avoid errors such as overpayment of salary.
- 18.4 Managers must maintain a comprehensive and accurate record of the actions taken in relation to sickness absence. This includes:
- A record of all sickness absence episodes (including duration and reasons given);
 - Notes of informal conversations and wellbeing check-ins;
 - Records of return-to-work interviews;
 - Documentation of any formal sickness absence processes, including review meetings or case management stages;
 - Evidence of support offered, such as referrals to Occupational Health or agreed workplace adjustments;
 - Consideration of redeployment or job redesign options, where appropriate.

These records are essential for ensuring consistency, transparency, and fairness, and should be securely stored and accessible only to authorised personnel.

19 Breaches of the Sickness Absence Policy

- 19.1 All employees are expected to adhere to the requirements and processes outlined in this Sickness Absence Policy. Failure to follow the policy or associated procedures may result in

disciplinary action, including but not limited to the withholding of pay, as per the terms of the policy. Disciplinary action will be taken in accordance with the Disciplinary Policy.

19.2 Examples of conduct that may be subject to disciplinary action include:

19.2.1 Unsatisfactory attendance;

19.2.2 Not engaging with the sickness absence management process, including failure to attend meetings, provide necessary medical documentation, or comply with the requirements of the absence management procedure;

19.2.3 Taking part in activities that are inconsistent with the cause of absence or prejudicial to recovery; and

19.2.4 Failing to comply with the requirements of the Sickness Absence Policy and Procedure.

19.3 Examples of offences that may be regarded as gross misconduct and could result in summary dismissal are:

19.3.1 Making a false claim of incapacity for work due to sickness;

19.3.2 Altering the contents of medical certificates; and

19.3.3 Carrying out other employment whilst on sick leave without permission.

Please note that the above list is not exhaustive.

19.4 **Overview of the Sickness Absence Review Procedures**

19.5 Monthly Sickness Absence Review (Internal - without employee)

Each month, schools and/or relevant line managers must undertake a Monthly Sickness Absence Review. This is an internal management check, not a meeting with the employee, and is used to:

- Identify trends or concerns in attendance across staff.
- Ensure consistency in managing absence across the schools.
- Determine if the threshold has been met for an informal or formal sickness absence review.
- Monitor follow-up from any previously held informal or formal reviews.

This process ensures all sickness absence concerns are captured in real time. Outcomes of this internal review may include:

- Scheduling an informal review.
- Progressing to a formal review process.
- Taking no further action if concerns are not substantiated.

19.6 Informal Sickness Absence Review

If the internal monthly review identifies a pattern or cause for concern, an Informal Sickness Absence Review may be scheduled. These are not disciplinary, but act as a supportive early intervention to address emerging patterns and offer help before formal procedures are necessary.

19.6.1 Triggers for an Informal Review Include:

- Two or more occasions of absence in a month (even single-day absences).
- Patterned absence, such as repeated absences on Mondays or Fridays.
- Absence during the probationary period, especially if more than once.
- Vague or non-specific reasons, such as repeated reports of “feeling unwell.”
- Observable impact on workload or team dynamics, including pupil outcomes.

19.6.2 The meeting should aim to:

- Raise the concern and explain the reason for the review.
- Give the employee an opportunity to provide context or medical information.
- Explore whether any support or adjustments are needed.
- Agree on any expectations or next steps.

The meeting should be held by the relevant manager or senior leader and should be documented, including any agreed actions.

19.7 Formal Sickness Absence Review

If there is no improvement after the informal stage, or if the nature/impact of absence is serious enough, a Formal Sickness Absence Review should be arranged. These are part of a three-stage formal process.

19.7.1 Triggers for a Formal Review Include:

- Where there are *3 occasions* of sickness, of any length, in the *previous 3-month period*.
- Where a *total of 10 days’ sickness* has been taken in the *previous 12-month period* (for this purpose, there is no distinction between certificated or self-certificated sickness).
- Has been absent for more than 28 days/4 weeks.
- Or there is any other concern by the manager due to their level of sickness or likely level of sickness. This may include combinations of odd days or longer periods and patterns of absence.

19.7.2 Meeting requirements:

- The employee must be given at least five working days’ written notice.

- They have the right to be accompanied by a trade union representative or colleague.
- Meetings should be held by the relevant manager or senior leader.

19.7.3 The meeting will cover:

- The employee's absence record and any patterns.
- Referrals to or advice from Occupational Health.
- The employee's explanation and any contributing factors.
- Any reasonable adjustments that could support improved attendance.
- The impact of the absence on the team and school operations.
- The expectations for improved attendance and potential consequences of not meeting them.

19.7.4 Possible Outcomes:

- No further formal action.
- A written warning (Stage 1).
- A final written warning (Stage 2).
- Potential dismissal following Stage 3.

In exceptional circumstances, where the level, pattern, or impact of absence is sufficiently serious, or where there are significant operational, safeguarding, or health and safety concerns, the procedure may progress directly to Stage 3 (dismissal) without prior formal warnings being issued. Any such decision must be proportionate, based on the evidence available, and take into account any mitigating factors. Advice should be sought from the BPET Head of People or Chief Executive Officer, before proceeding.

Written outcomes must be provided within five working days, including the employee's right to appeal. Formal warnings remain live for 12 months.

19.8 Monthly Absence Review (Follow up - With Employee)

Following either an informal or formal sickness absence review, a Monthly Absence review should be scheduled with the employee present. These are designed to:

- Monitor progress against agreed attendance targets.
- Revisit support strategies or reasonable adjustments.
- Review any new concerns or changes in pattern.
- Confirm whether to de-escalate, continue, or escalate to the next stage.

These reviews are essential to ensure accountability and sustained improvement. The distinction between a follow-up to an informal or formal stage must be clearly documented.

19.9 Roles and Responsibilities

Line Managers / Operations Managers: Responsible for reviewing sickness records monthly and conducting informal reviews when needed.

Headteacher: Can conduct formal reviews or delegate to an appropriate line manager, including the operations manager.

BPET Head of People and / or Senior Leadership Team (SLT): Can be involved in both informal and formal meetings when needed to ensure a fair and consistent approach.

HR Provider: May assist in meetings and offer support in decision-making.

For clarity, Section 4: Governance, Roles, and Responsibilities outlines who holds the reviews, writes the letters, and Section 24: Appeals, the process for escalation.

19.10 Supportive Approach

It is important that both informal and formal reviews are conducted supportively, keeping in mind the operational, financial, and educational considerations. Sickness absence can significantly impact pupil outcomes, and absenteeism may result in increased workload for colleagues. However, the primary goal is to ensure that employees receive the support they need to improve attendance while also maintaining the school's operational effectiveness.

As part of this, support may include:

- Reasonable adjustments that may have been proposed to support the employee
- Assistance with making arrangements for treatment or medical appointments.
- Access to employee assistance programs or external support where needed.

All meetings should encourage open communication and ensure that the employee feels listened to and supported in their efforts to improve attendance.

19.11 Reasonable Time for Improvement

The length of time deemed reasonable for attendance improvement should be based on a balance between the needs of the school and the individual circumstances of the employee. Schools must allow a fair and appropriate timeframe for improvement, considering operational, financial, and educational factors. This timeframe should be clearly communicated, and both parties should engage in open dialogue to agree what constitutes a reasonable period for improvement. This principle applies to all formal stages of the absence review process.

19.12 Duration of Warnings

Formal warnings issued as part of the sickness absence procedure, including written and final written warnings, will normally remain active for a period of 12 months from the date of issue, unless stated otherwise. After this period, they will be disregarded for the purposes of further absence management action, unless there is a pattern of persistent absence or other relevant circumstances.

20 Right to be accompanied at meetings

- 20.1 You may be accompanied at any meeting or appeal meeting held under this procedure.
- 20.2 Your companion may be a recognised trade union representative or a workplace colleague. You should inform your line manager, or the person conducting the meeting, of your chosen companion in advance of the meeting.
- 20.3 Employees acting as companions are entitled to reasonable time off during working hours to fulfil this role, without loss of pay. However, there is no obligation for any employee to act as a companion, and they may decline the request.
- 20.4 At our discretion, we may permit an alternative companion (such as a family member) where this would help overcome particular difficulties — for example, a disability or difficulty understanding English.
- 20.5 Certain companions may not be permitted, for instance, individuals who may present a conflict of interest or whose presence could prejudice the meeting.
- 20.6 Your companion may make representations, ask questions, and summarise your position, but they are not permitted to answer questions on your behalf. You may speak with your companion privately at any point during the meeting.

21 Sickness Absence Review - Stage 1

- 21.1 This will follow the procedure set out in paragraph 19.3 and section 20 regarding the arrangements for, and right to be accompanied at, sickness absence meetings.
- 21.2 Where a line manager or Headteacher determines that an employee's attendance requires formal review (typically after a trigger point has been reached), they will invite the employee to a formal meeting, providing at least five working days' notice in writing.
- 21.3 The purposes of the meeting may include:
 - 21.3.1 Reviewing the employee's attendance record and/or exploring the reasons for absence.
 - 21.3.2 Considering any relevant medical advice, including the outcome of an Occupational Health referral.
 - 21.3.3 Determining how long a period of long-term absence is likely to last, if applicable.
 - 21.3.4 Discussing whether any reasonable adjustments or support measures could help improve attendance or facilitate a return to work.
 - 21.3.5 Identifying actions that may support the employee's health, wellbeing and attendance.
 - 21.3.6 Clarifying what is considered to be an acceptable level of attendance and the implications if this is not met.

- 21.3.7 Confirming whether a private medical certificate will be required (at the School's expense) for any further absence during a review period.
- 21.4 Agreeing next steps, including any action required, and the date of the next review meeting.
- 21.5 The manager may adjourn the meeting if new facts emerge that require further investigation.
- 21.6 Following the meeting, the manager will review the discussion and decide on one of the following outcomes:
 - 21.6.1 No formal action – if concerns about attendance are not substantiated, or if informal monitoring is deemed more appropriate.
 - 21.6.2 Written warning – if improvement is required. This will be confirmed in writing, along with the review period, expectations regarding attendance, and consequences of failing to meet them.
- 21.7 Any written warning will remain live for a specified period (see section 19.7), and the employee will be informed of their right to appeal in writing within five working days of receipt.
- 21.8 It is possible for more than one review to be held under Stage 1 where appropriate, but no progression to Stage 2 will occur until a formal warning has been issued at this stage.
- 21.9 Stage 2 will only occur if a formal written warning has been issued at Stage 1, and after a reasonable period has been allowed for improvements to be made. This allows the employee sufficient time to address the concerns raised during Stage 1.

22 Sickness Absence Review - Stage 2

- 22.1 If the required improvement in attendance has not been achieved following the First Formal Stage, further formal review will be arranged, providing the employee with at least five working days' notice in writing. Arrangements for this meeting will follow the procedure set out in paragraphs 19.3 and 20 regarding the arrangements for and right to be accompanied at sickness absence meetings.
- 22.2 The meeting will usually be conducted by the same person (Headteacher or Line Manager) responsible for the First Formal Stage meetings. The substance of the meeting will follow a similar structure but will reflect the increased level of concern and the potential consequences for the employee due to insufficient improvement in attendance.
- 22.3 The purposes of the meeting(s) may include:
 - 22.3.1 Discussing the reasons for and impact of the employee's ongoing absence(s).
 - 22.3.2 Where the employee is on long-term sickness absence, discussing the anticipated duration of the absence.
 - 22.3.3 Where the employee has had multiple absences, assessing the likelihood of further absences.

- 22.3.4 If not already obtained, considering whether further medical advice is required. If advice has been obtained, reviewing the recommendations and determining if further action is needed.
 - 22.3.5 Assessing the employee's ability to return to work and considering any necessary adjustments to the role or working conditions.
 - 22.3.6 Exploring redeployment opportunities and whether any reasonable adjustments can assist in facilitating a move.
 - 22.3.7 If the employee is able to return from long-term sick leave, agreeing to a phased return-to-work plan.
 - 22.3.8 If the employee is unlikely to return to work, consider whether they are eligible for any benefits.
 - 22.3.9 Discussing the way forward, the actions that will be taken, and establishing a timeline for further review or meetings, which may include warning the employee of potential dismissal.
 - 22.3.10 Issuing a Final Written Warning if attendance does not improve or the employee does not return to work.
- 22.4 After the meeting, the Headteacher or manager will review the discussion and decide on one of the following actions:
- **No formal action** – if there has been sufficient improvement in attendance, or if an underlying medical condition has been identified that requires an alternative management route.
 - **Final Written Warning** – if attendance concerns persist, despite the support already provided.
- 22.5 The employee will be notified of the decision as soon as possible, and in any case, within five working days of the meeting. The notification will include details of any further review meetings, actions required, and expectations for attendance. If a Final Written Warning is issued, it will outline the period during which it remains live (see section 19.7 on Warnings). The employee will also be informed of their right to appeal the decision within five working days of receiving the written notice.
- 22.6 More than one formal meeting may be held under Stage 2 if a Final Written Warning has not been issued during the initial meeting. Additional meetings will be held as necessary to ensure the situation is addressed appropriately.

23 Sickness Absence Review - Stage 3

- 23.1 Where you have been warned that you are at risk of dismissal and the required improvement in attendance has not been made, we may invite you to a meeting under the third stage of the sickness absence procedure. Arrangements for this meeting will follow

the procedure set out in paragraphs 19.3 and 20 regarding the arrangements for and right to be accompanied at sickness absence meetings.

23.2 The purposes of the meeting will be to:

- 23.2.1 Review the meetings that have taken place, the matters discussed, and any warnings issued.
- 23.2.2 Consider whether there have been any changes since the last meeting under Stage 2, either with regard to your possible return to work or opportunities for return or redeployment. (If you remain on long-term sickness absence).
- 23.2.3 Consider any further matters that you wish to raise.
- 23.2.4 Consider whether there is a reasonable likelihood of you returning to work or achieving the desired level of attendance within a reasonable time.
- 23.2.5 Assess whether ill health retirement is a possibility, especially if medical advice indicates it is unlikely that you will be fit to return to your role in the near future.

23.3 The meeting may be adjourned if, in the view of the manager, the meeting cannot continue until new evidence is investigated.

23.4 After the meeting, the manager will consider all the evidence presented and decide on one of the following actions:

- 23.4.1 **No further formal action** – if there has been a significant improvement in attendance, or if medical advice suggests an alternative route is now appropriate.
- 23.4.2 **Extension of the current warning or monitoring period** – if there is evidence of some improvement and a decision is made to allow additional time before considering further action.
- 23.4.3 **Dismissal on the grounds of capability (ill health)** – if concerns persist and it is determined that the required level of attendance cannot reasonably be achieved.

23.5 Where dismissal is being considered, the manager will first discount options which could be put forward as an alternative to dismissal where these have not already been considered and reasonably rejected, such as reasonable adjustments for an employee with a disability.

23.6 You will be notified of the decision as soon as possible and, in any event, in writing within 5 working days. The letter will include confirmation of the manager's conclusions and what, if any, formal action is being taken.

23.7 In cases of persistent short-term absence where the outcome is not dismissal but concerns remain, the letter will outline what actions and improvements are needed to avoid the need for a further formal meeting. The letter will also confirm your right to appeal the decision in writing within 5 working days of receipt.

- 23.7.1 Termination will typically occur with full notice or payment in lieu of notice. The school will issue notice of termination in accordance with your contractual or statutory notice period (whichever is greater). As a general rule, you will not be expected to attend work during the notice period, irrespective of your current health position.

24 Appeals

- 24.1 You may appeal against any formal action taken under this procedure, including written warnings and dismissal. You may also bring a companion to an appeal meeting (see paragraph 20 for details on the right to be accompanied).
- 24.2 Appeals must be submitted in writing within 10 working days of the date on which the outcome letter was sent to you. The appeal must clearly state the grounds for the appeal. Appeals should be addressed to your line manager unless otherwise directed.
- 24.3 Appeals against outcomes issued at the First or Second Stage will normally be heard by a more senior manager or the Headteacher. No person may hear an appeal against their own decision.
- 24.4 The appeal meeting will be arranged as soon as reasonably practicable. You will be given at least 5 working days' written notice of the date of the appeal meeting, or 10 working days in cases of dismissal.
- 24.5 The purpose of the appeal meeting is for the Appeals Panel to consider the grounds of appeal and to review the fairness and reasonableness of the original decision. The appeal may take the form of a review or, where appropriate, a full rehearing. New evidence may be presented during the appeal; however, no additional grounds for action will be introduced by the employer.
- 24.6 You will be provided with written details of any new information which comes to light before the appeal meeting and given a reasonable opportunity to consider it.
- 24.7 Following the appeal, the outcome may be to uphold the original decision, to revoke it, or to replace it with a different decision. The outcome will be confirmed in writing within 5 working days of the appeal meeting wherever possible. The decision of the Appeals Panel is final, and there is no further right of appeal.
- 24.8 The date of any dismissal will not be delayed while the appeal is being heard. However, if your appeal is successful, you will be reinstated without loss of pay or continuity of service, and any notice pay already provided will be adjusted accordingly.

25 Who will hear the appeal?

The appeal will be heard by a person or panel who is, wherever possible, at least one level senior to the individual who made the original decision. The following arrangements apply:

25.1 School Based Staff (excluding Headteachers)

- 25.1.1 If the appeal is against a decision made by a senior or middle leader, the employee must write to the Headteacher, clearly stating the grounds of appeal.
- 25.1.2 If the appeal is against a decision made by the Headteacher, the employee must write to the Headteacher's line manager (normally the Director of Education or Executive Headteacher) via info@bpnet.co.uk clearly stating the grounds for appeal.
- 25.1.3 The Headteacher is responsible for setting up the appeal hearing on behalf of their line manager.

25.1.4 The appeal will be heard by

- The Headteacher, if they are not involved in the original decision; or
- The Director of Education or Executive Headteacher.

25.1.5 When a panel is convened, the most senior member of the panel will act as Chair and will hold the deciding vote if the panel cannot reach agreement.

25.2 Headteachers

25.2.1 If the Headteacher is line managed by an Executive Headteacher, the appeal will be heard by the Director of Education and an independent adviser.

25.2.2 If there is no Executive Headteacher in place, the appeal will be heard by the Director of Education or Chief Executive, supported by the Head of People where appropriate.

25.2.3 The employee must submit their appeal in writing to the relevant person via info@bpnet.co.uk, clearly outlining the grounds for appeal.

25.3 Executive Headteachers and Central Team Staff (including the Director of Education)

25.3.1 Appeals will be heard by the Chief Executive, supported by an independent adviser.

25.3.2 The appeal must be submitted in writing to the Chief Executive via info@bpnet.co.uk, setting out the full grounds for appeal.

25.4 Chief Executive

25.4.1 Appeals will be heard by the Chair of the Board of Trustees, along with two other Trustees.

25.4.2 The appeal must be submitted in writing to the Chair of the Board via info@bpnet.co.uk, clearly stating the grounds for appeal.

In all instances, the decision-maker may be supported by a member of the Central Team or an independent adviser.

26 Review of policy

26.1 This policy is reviewed every three years by BPET. We will monitor the application and outcomes of this policy to ensure it is working effectively.

27 Approval by Bellevue Place Education Trust Board

27.1 This policy has been formally approved and adopted by the BPET Board.