The Athelstan Trust
Internal Appointments Policy

Date of Review	Approved by	Date of Approval	Next Review Date	Website
May 2026	Board	14th May 2026	May 2029	Yes

1. Purpose of the Policy

The purpose of this policy is to provide a clear, fair and transparent framework for the appointment of individuals to internal positions within The Athelstan Trust. The policy supports effective workforce planning, talent development and succession planning, while ensuring that appointments are made on merit and in line with the Trust's values and statutory obligations.

2. Scope

This policy applies to:

- All employees of The Athelstan Trust.
- Internal appointments on a permanent, temporary or fixed-term basis.
- Promotions, re-gradings, secondments and acting roles.
- Trust-wide roles and school-based roles.

3. Key Principles

The Trust is committed to ensuring that all internal appointments are:

- Fair, open and transparent
- Based on merit and suitability for the role
- Informed by objective performance evidence
- Consistent with equality, diversity and inclusion principles
- Compliant with safer recruitment requirements
- Aligned with the Trust's strategic and educational priorities

Internal appointments should balance the development of staff with the need to maintain high standards of leadership, teaching, governance and professional practice.

4. Eligibility for Internal Appointment

To be eligible for consideration, employees must:

- Hold a current contract with the Trust
- Meet the essential criteria in the person specification
- Have performance that is assessed as satisfactory or better, unless exceptional circumstances apply

Where an employee is subject to:

- Formal capability procedures
- Formal disciplinary sanctions

they will normally be ineligible for appointment until such matters are concluded, unless approval is explicitly given by the Headteacher or CEO.

5. References

Two references will be sought (including one from the most recent employer) via the My New Term platform. The Trust reserves the right to request a third referee.

6. Advertising the Role

Roles will be advertised to the widest pool of suitable applicants. The Headteacher or CEO will make this decision on a case by case basis, and must have an appropriate rationale for their decision.

All vacancies will be advertised via My New Term, even where there is a restricted pool of candidates and will meet the requirements set in the Trust Recruitment and Selection Policy.

Acting appointments may be made without a full selection process in an unforeseen situation (e.g. staff illness, critical operational need or failure to appoint following a recruitment process). Acting appointments will be for a fixed period of time and subject to regular review.

7. Selection and Assessment

Shortlisting, interviews and assessments of candidates will be completed as per the Trust Recruitment and Selection Policy.

All interviews must follow Safer Recruitment practices, with at least one panel member who has completed the Safer Recruitment training in the last three years.

Where an appointment involves increased regulated activity or a move into a safeguarding-critical role the Trust will ensure:

- DBS checks are updated where required
- Safeguarding training is current
- Any concerns raised in performance reviews related to conduct or safeguarding are addressed

8. Decision making, feedback and offers

Decision making and feedback will be completed as per the Trust Recruitment and Selection Policy.

Feedback will also be given to all candidates, including those who are not shortlisted for interview.

9. Post-Appointment Review

The Trust Probationary Policy will not apply to internal appointments, unless the successful candidate has less than 6 months continuous service. However, a process of reviews which mirror the Trust probationary process will apply, and reviews will therefore take place at 6, 12 and 16 weeks where the line manager will review and assess the employee's conduct, performance, capability and suitability for the role. The candidate will be subject to the usual Appraisal process. During this period, all Trust and School Policies and Procedures apply including the Code of Conduct, Sickness Absence, Disciplinary and Grievance Procedures.

A clear record must be made of each review meeting. Following each meeting, a copy of the record (see appendix 1) must be passed to the employee and the original forwarded to the HR lead. Further appraisals will be completed as per the Trust Appraisal Policy.

10. Concerns and Appeals

Candidates who believe the recruitment process was conducted unfairly may submit an appeal within ten working days of receiving their outcome. Appeals must be made in writing and should clearly outline the grounds for review, including any relevant evidence. The Trust Recruitment and Selection Policy sets out the process of managing an appeal.

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Appendix 1

Internal Appointment Review Form

This form must be completed by the line manager to record the discussion and assessment of an employee's performance and progress following their appointment to a new role. A review must be completed 6, 12 and 16 weeks after the employee has started in their new role. A copy of this record must be provided to the employee, and the original sent to the school HR lead.

Employee Details	
Employee name	
Job title	
Start date	
Date of this review	

Expectations communicated at start of employment

Employees must be informed at the start of their employment about what is expected including required job outputs, standards of performance, and expectations in terms of conduct. Please confirm that has been done and what induction training has been completed. Briefly summarise or attach relevant documentation if applicable (e.g. has the induction checklist been completed?).

Assessment of performance, conduct, capability, and suitability:

(Based on observation, feedback, and discussions. Provide specific examples where possible.)

	Excellent	**Good**	**Fair**	**Improvement required**
Quality of work				
Quantity of work				
Dedication to the job				
Ability to work without supervision				
Working relationships				

Feedback provided during review period:

(Summarise the regular feedback provided to the employee since the last review or start date, including any problem areas raised and discussed.)

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Have there been any periods of absence:

(If applicable, please document number of days of absence and reasons. Has this had an impact on the line manager's ability to review progress?)

Have there been any issues with timekeeping:

Support, guidance, and training provided:

(Detail any support, guidance, coaching, or training identified or arranged to help the employee meet expectations.)

What is the employee's feedback on the job and the training received:

Progress and overall assessment for this period:

(Summarise the employee's overall progress and suitability for the role during the period covered by this review.)

Objectives/required standards for next period

(Clearly state the key objectives, performance standards, or areas the employee needs to focus on and achieve by the next review)
