

Flexible Working Policy & Support Pack



NatWest
Group

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We regularly update this document. Make sure you have the latest version by downloading it from the intranet.

This policy and supporting information pack is not contractual and is subject to change at NatWest Group's discretion. It will be reviewed from time to time to make sure it continues to meet the Group's legal obligations and business needs.

Who's this for?

This pack applies to **employees and line managers in Great Britain and Offshore (Jersey, Guernsey, Isle of Man and Gibraltar)** who are considering requesting a flexible working arrangement or who are managing a flexible working request, be it formal or informal.

It **does not apply** to agency workers and contractors.

This pack doesn't apply to international remote working. Further information on this can be found in the International Remote Working Policy (Human Resources > Working Here > International remote working).

Our Purpose through policy

Supporting flexible working champions potential and supports families through facilitating a healthy work life balance and helps us bring the best of ourselves to work. Offering dynamic, creative, and engaging workplaces drives the way we work in a style that gives greater variety of options and choice. This will ultimately help our businesses to thrive.

How should you use this policy?

The pack is split into two parts:

Information.

If you want specific information about our approach to flexible working, flexible working options, and/or general flexible working considerations, go to the information contents.

Scenarios.

If you're dealing with a specific scenario and want to understand what you should do as either a line manager or employee, go the scenario contents and find the one that fits your circumstances.

Where to go for more information



If you have any questions on the policy or supporting process or if you're dealing with a complicated case, you can Ask Archie for further support and guidance.

Related content

- Flexible working application form (Human Resources > Working here > Life balance > Flexible working > Tools to help you).

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1. Our approach to flexible working

We value flexible working and the support it offers our employees in helping them manage their work life balance. In doing so, there's a few principles which help define our approach:

- Each request for flexible working should be given careful and positive consideration for what is right for employees, the team, the Group, and the customer.
- Open conversations are encouraged between employees and line managers, and where agreement can't be reached, both parties should consider if there are any alternatives or a compromise.
- In granting a request, any potential adverse impact on the running of the business, and how this can be minimised should be considered.
- Requests can be both informal (usually shorter term and in response to specific temporary circumstances) or formal (usually longer term).
- Flexible working arrangements should be reviewed regularly to make sure they still work for all involved.

1.1. Roles and responsibilities

Every one of us has the responsibility to help each other do our jobs to the best of our ability. To support open and fair conversations about flexible working, we expect employee and line managers to:

Employees

- Understand and think through the options available to you by reading this policy, including familiarising yourself with the application process (both informal and formal).
- Understand how flexible working may affect things like your pay, pension and Value Account, your NatWest Group Benefits options and holiday entitlements.

Line Managers

- Understand and follow the guidance outlined in this policy, especially where a formal request has been made which requires you to follow a time bound process.
- Make fair and well-reasoned decisions considering the impact on our customers, the team, the individual and the business.
- Commit to the process and if needed, investigate reasonable options to best support a request, particularly where the original request is difficult to agree.
- Ensure all relevant steps in the process are completed, e.g., requesting a new contract (if needed) if you've supported a request.
- Seek advice and guidance if you are not able to support a request, and always contact Ask Archie for advice and consult with the employee before declining a request.
- Consider the wellbeing of the employee and what other support they may need if they've expressed difficulty in trying to balance the challenge of work and personal commitments.

2. Types of flexible working arrangements

Different working arrangements can balance the needs of employees and the business by giving them a choice as to how they work.

Table 1 outlines the flexible working arrangements we offer. The suitability of these for an employee / team /business will vary depending on a number of things including:

- The role undertaken e.g., is it regulated role?
- Nature of the work e.g., is the job exclusively branch based/customer facing?
- The business worked in and whether they can operationally accommodate the working arrangement that is being requested.
- Other existing flexible working arrangements in the team.
- Sometimes a combination of different types of flexible working can be considered if its right for the employee and the business.

Table 1. Types of flexible working arrangements

| Flexible Working Arrangement | How does this work? | What needs to be considered? | Employment contract change required? | Further Information |
|------------------------------|--|---|--|---|
| <p>Part Time</p> | <p>Employees work less than the standard hour working week.</p> <p>E.g., working 21 hours per week when the standard contract for the business area is 35 hours per week.</p> <p>The hours can be worked in a variety of options as long as they support employee and business needs. E.g.,</p> <ul style="list-style-type: none"> • 21-hour week could be three days of seven hours • 20-hour week could be five days of four hours | <p>Can the work be completed in less than full time hours?</p> <p>Will key periods within the day be covered when extra support is required e.g., mid-day?</p> <p>There may need to be flexibility in terms of peak workload, or the days worked.</p> | <p>No contract changes.</p> <p>Workday should be updated to reflect the part time hours and a notification will be raised from this.</p> <p>The Workday work schedules should also be updated.</p> | <p>Working additional hours</p> <ul style="list-style-type: none"> • If a part time employee is asked to work additional hours above their normal weekly contracted hours and is eligible for overtime, the additional hours will be paid at the same rate as their contractual hourly rate. This is known as the “overtime flat rate”. • Where relevant, any hours worked above the 35-hour standard contractual rate will be paid as weekday overtime depending on the grade of the employee. • Benefits arising from additional hours worked throughout the year will be accrued on a calendar year basis. <p>Additional Hours and Holidays</p> <ul style="list-style-type: none"> • If employees work more hours than their scheduled part time hours (calculated over the full year), they will be entitled to additional holidays. • These will be based on the additional hours worked and allocated in the following year. • Additional hours will be given up to a maximum of the full-time equivalent entitlement. • Details of any additional hours an employee has worked during the year will be given to the employee’s line manager in March of the following holiday year. <p>Additional Hours and Pensions</p> <p>Additional hours will also have an impact on employee’s pension plans:</p> <ul style="list-style-type: none"> • For members of one of the Group’s Final Salary Pension Plans, the details of the additional hours an employee has worked will be incorporated into the employee’s accrued pension benefits. • For members of the NWG Retirement Savings Plan, additional payments will be made through the Value Account in line with the additional hours worked. • Note that plan contributions will continue as a percentage of this higher value. |

Additional Hours and Discretionary Bonus

Additional hours will have to be taken into account for an employee who has worked these hours during the bonus period where they are bonus eligible.

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| <p>Variable Hours</p> | <p>Employees alter the start and finish times of work whilst still working their total contractual hours.</p> <p>E.g., An employee works 35 hours per week and covers hours from 10am to 8pm three days and 8am to 2.30pm two days per week.</p> | <p>Will meaningful work be available during the planned hours of work?</p> <p>Will the needs of the customer, team and business be met?</p> | <p>No contract changes as long as there is no change to the total number of hours worked.</p> <p>The Workday work schedules should be updated.</p> | <p>With our freedom within a framework and new ways of working, variable hours can support employees who need to vary their start and finish times during the working day to accommodate other aspects of their life e.g., school pick up/drop offs.</p> |
| <p>Job Share</p> | <p>Two employees voluntarily share the duties of one full time position.</p> <p>The working week will be shared between the employees. This may be equally e.g., 50% each or a 60/40% split.</p> | <p>Can workloads be managed over a number of hours rather than a regular pattern?</p> <p>There may need to be flexibility in terms of peak workload, or the days worked in order to attend meetings etc.</p> | <p>No contract changes but the contract type on Workday should be updated to ‘job share’ and the number of hours an employee works should be updated if that is also changing. This will generate a notification to be issued.</p> | <ul style="list-style-type: none"> • Job shares can be a great way for part time employees to move and progress within the bank and also for those full-time employees wanting to reduce their hours. • Job shares also promote inclusivity and diversity in our teams by supporting employees who are returning from long term leave, e.g., maternity/adoption leave or returning from one of our long-term disability schemes. • We encourage hiring managers to consider advertising their jobs on a job share basis and/or give positive consideration to job share candidates who apply for their jobs. • There are various things to consider when thinking about a job share agreement such as how is one found, how are holidays and performance managed and what if one part withdraws from the job share agreement. • Further information can be found on the job share intranet page or the Job Share scenario section. |
| <p>Compressed Hours</p> | <p>Employees works longer hours over fewer days.</p> <p>E.g., an employee may work 4 extended days rather than 5 x 7-hour days, or 9 days per fortnight instead of 10.</p> | <p>Whether workloads can be managed over the time available.</p> <p>Does every working day need a contact e.g., in person in</p> | <p>No contract changes as long as there is no change to the total number of hours worked.</p> | <ul style="list-style-type: none"> • Not every job is suited to compressed working, and this should be taken into account when making a request or considering a request that’s been submitted. • For example, compressed hours are more suited to time dependent/shift jobs (e.g., starting and finishing at certain times of the day), or in jobs where it isn’t common to exceed a fixed number of hours each week. |

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| | | <p>the office or during core hours?</p> <p>Will there be meaningful work available in the suggested working hours?</p> <p>There may need to be flexibility in terms of peak workload, or the days worked in order to attend meetings etc.</p> | <p>The Workday work schedules should be updated.</p> | <ul style="list-style-type: none"> • Where compressed hours may be harder to support are in jobs where employees are expected to work the (reasonable) hours necessary to complete their duties without additional pay (i.e., where hours can vary far more widely depending on what comes in on the days the employee is working). • Further information can be found in the Compressed Hours scenario section. • The Holiday and Other Leave policy will provide guidance on how to treat bank holidays and annual leave entitlements under a compressed hour arrangement. • Compressed hours arrangements should be reviewed annually to ensure they still meet the needs of the business and are operationally viable. • When an employee who works a compressed hours arrangement moves jobs, their working pattern does not automatically transfer with them to their new job. A discussion will need to be had with their new line manager as to whether the compressed hours arrangement (if still required) can be supported. |
| <p>Annualised Hours</p> | <p>Where an agreement is made for the number of annual hours an employee will work but the pattern can vary from employee to employee.</p> <p>E.g., Term time working where an employee works during school term time and doesn't work during the holiday period.</p> | <p>Can the arrangement support the peaks within the business area?</p> <p>Managers must consider:</p> <ul style="list-style-type: none"> • How this impacts work in practice. • Allocation of holidays outside of the annualised hours. • How sick pay will be managed if the employee is taken | <p>Yes, if the number of hours an employee works will change.</p> <p>This should be done on Workday and a notification will be issued.</p> | <ul style="list-style-type: none"> • Hours can either be fixed at the start of each year or scheduled on a rolling basis e.g., at the start of each term. • It's fundamental to the success of these arrangements that appropriate records are maintained to assist with the scheduling of work hours, holidays, and other time away from work such as training, sickness etc. • Term time working is only available while an employee's child/children are at school. Once they complete their school years, other flexible working arrangements should be considered if required, e.g., part time hours. • Salary will be based on the actual number of hours worked over the year and will be paid in twelve equal monthly instalments. This means that a salary payment will still be made during the weeks/months in which the employee is not working. • Holidays will be pro-rated for the number of contractual hours. • Sickness Absence - Regardless of whether an employee is ill during working times or non-working times, they must log sickness absence on Workday in the usual way. |

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| | | ill during their non-working period. | | |
| Winding down to retirement | <p>An employee who is approaching retirement may consider it beneficial to work in a more flexible manner in the run up to their chosen retirement date.</p> <p>This is normally a phased reduction in working hours each day/week over a period of time.</p> | Can the arrangement support the peaks within the business area? | No | <ul style="list-style-type: none"> • Wind down to retirement should not start more than 3 months prior to the actual retirement date and can be agreed between the employee and their line manager. • The period of wind down will not be considered as an adjustment to the employee's contract of employment and therefore will not impact on any salary or benefits to which the employee is entitled. • Wind down to retirement is not available as part of voluntary redundancy. • Additionally, there will be no change to the annual holiday entitlement during the wind down period. Where the employee is working a reduced number of days, then that number of days will be considered as one full week's holiday i.e., if the employee is working 3 days per week, then 3 days annual leave entitlement will be deducted for a week's holiday. |

3. Informal or formal flexible working requests

Requests for flexible working can be either informal or through the formal application process and can be made from day one of employment.

Informal requests are just that, an informal mutually agreeable arrangement between an employee and a line manager. They are usually put in place on a short term or ad-hoc basis, to address a change in personal circumstances. Examples of this may include:

- A relative is in hospital and an employee would like to work reduced hours temporarily to visit them.
- An arrangement to cover an unexpected change to childcare circumstances which may require a change to an employee's start time for a week to accommodate school pickups.
- A change to support the attendance or participation in a religious festival.

Formal requests are those that follow the statutory process.

Note: there is a separate formal process for Jersey, please see the Jersey Addendum

Two statutory requests can be made in a 12 month period, and this is only available to employees, it does not apply to agency workers or contractors.

Here's further information under the specific request types:

3.1. Informal Process

- This is a verbal process with no application form.
- Whilst there is no formal process to follow, line managers and employees should still take a sensible approach when asking for and making decisions about the informal request.
- Requests should be reviewed alongside work priorities to ensure that the demands of the business can be met. Line managers may also wish to consider the impact on the employee and the long-term benefits in relation to engagement if an employee can work flexibly for an informal short period of time.
- The proposed start date is usually imminent.
- A line manager is usually able to agree to the request without further consideration, i.e., there is no impact on the wider team that needs addressing.
- An informal arrangement could be used to determine or test whether a specific flexible working arrangement works for an employee/team/business, and if so, may lead to a formal request.
- There is no set time period for what a short-term request may be given requests are dependent on individual circumstances. As a guide, they typically last up to two months. If after this time the arrangement needs to continue, it may be appropriate to consider a request under the formal process.

It's recommended that a line manager and employee:

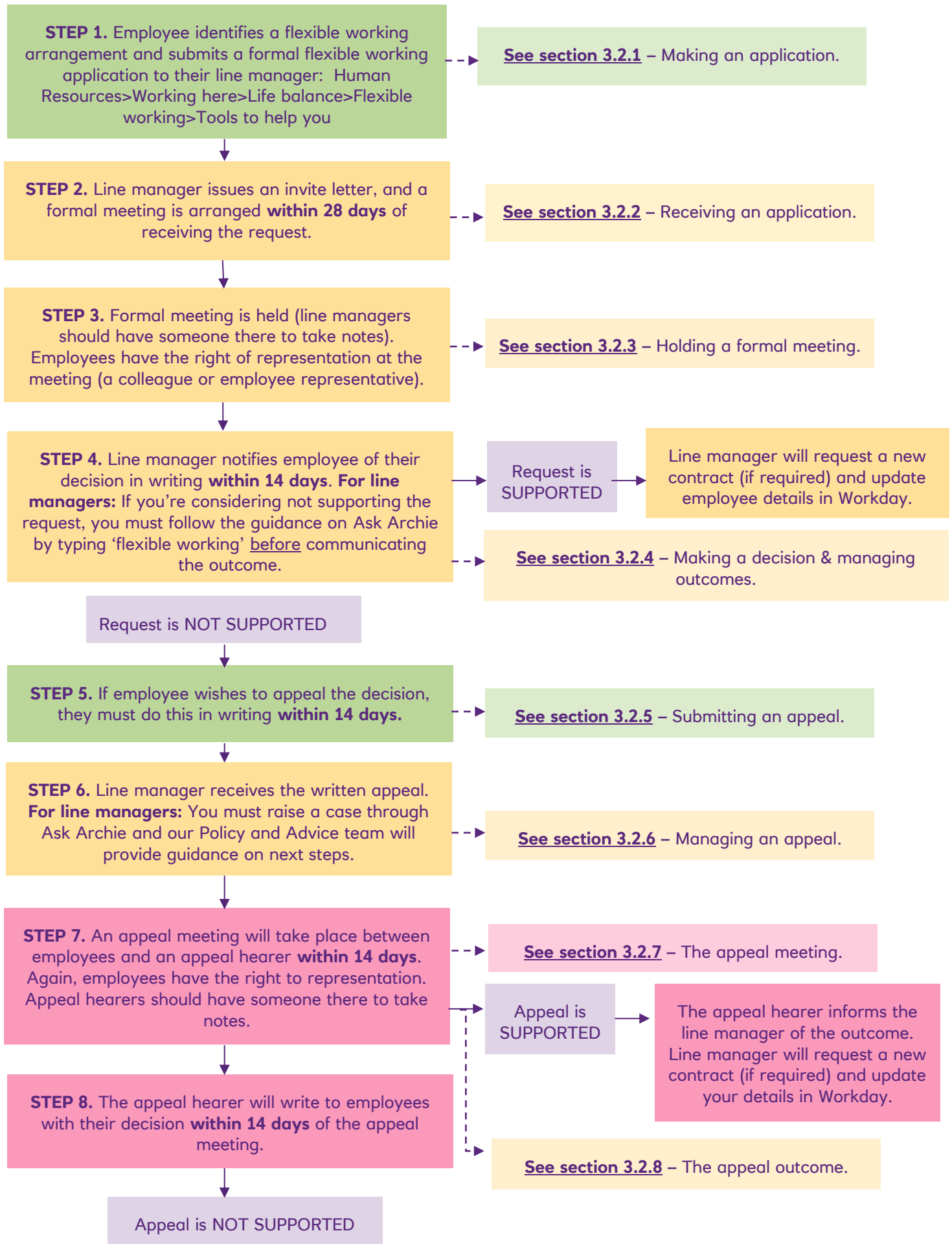
- Meet to discuss and agree how the arrangement will work in practice.
- Be clear on the duration of the request.
- Be clear on what the working arrangement will be.
- For transparency, capture the agreement locally to ensure a record of the arrangement has been kept.
- Agree on how any reduction in hours will be reasonably made up.

3.2. Formal Process

Note: there is a separate formal process for Jersey, please see the Jersey Addendum

The formal process we follow ensures we meet our statutory legal obligations regarding flexible working applications. This includes review timescales and legal criteria for declining a formal request. Here's a step-by-step guide to the formal process:

Formal Flexible Working Process



3.2.1. Making an application

You'll need to provide information to your line manager to support your application. This should include what your proposed working pattern would look like.

3.2.2. Receiving an application

If you're a line manager who has received an application, there are a number of actions that must be completed to comply with legislation.

Arranging a meeting

- You'll need to arrange a meeting with the employee to discuss their application.
- You must provide the employee with an invite letter to a formal meeting. You can access the invite letter template through Ask Archie.
- The meeting must be held no later than 28 days following receipt of the application. If you can't meet these timescales, you'll need to tell the employee in writing of the reasons for the delay and the expected timescale for the discussion.
- The employee should be asked to agree to the extension. If it's agreed, this should be documented in writing, stating the date the extension was agreed, what the extension relates to and the date the extension ends. A copy of this should be sent to the employee.

If you're an employee:

- You have the right to be represented by a colleague or an employee representative from within the Group.
- You're also able to request a change to the meeting date to make sure that your representative can attend as long as the new date is within seven days of the original meeting.

Considering the Application

If you're a line manager, you'll need to:

- Prepare and consider the request before the meeting using the ideas and questions below.
- Have in mind that sometimes an application may suggest a way of working which isn't the norm. This doesn't mean that it can't work.
 - Does the employee's proposed working arrangement fit in with the tasks outlined in their job description?
 - If not, could the tasks be divided up differently?
 - Could work be re-allocated to another team member without any detrimental impact on them?
 - Any wider impacts on the team?
 - Could this change be beneficial to customers?
 - Can the job be flexible in terms of peak workload or the days the employee works?
 - Will there be a positive impact on the employee?

3.2.3. Holding a formal meeting

- The formal meeting is an opportunity for employees and line managers to explore the request, ask questions and for line managers, help with their decision making.
- If you're a line manager, you'll need to explain the next steps to the employee at the end of the meeting which will be either:
 - To confirm a decision will be given in writing as soon as possible following the meeting, usually within 14 days; or
 - Where further investigation is needed, advise the employee of this and gain their agreement to any proposed extension. This must be completed within 2 months of the application being made and it must be documented in writing and sent to the employee. You can access the extension letter template through Ask Archie.

3.2.4. Making a decision and managing outcomes

Making a decision

- If you're a line manager, you must communicate your decision to the employee within 14 days of the meeting (except where an extension has been mutually agreed). You can access the outcome letter template through Ask Archie.

- In addition to the information already gathered, you may also wish to consider the following:
 - Will there be any additional costs incurred by the business in order to accommodate the request?
 - Will these costs have a significant impact on the business?
 - Will the request have a detrimental impact on the ability to meet customer demand/service provided to external or internal customers? If so, what arrangements can be put in place to maintain customer demand/service?
 - How can the arrangement support the operation of the business and meet the needs of the job holder?
 - Is it possible to recruit additional employees to accommodate the request e.g., Job Share partner?
 - Is there sufficient work during the periods the employee proposes to work if these are in non-core hours?
 - There may be occasions where a number of employees are already working flexibly, and the business area or team will have limited capacity to grant similar requests. In such circumstances alternative working patterns should be considered.

Managing Outcomes

There are three possible outcomes and the information below details what needs to be completed in each case.

1. Accept
2. Offer a compromise
3. Decline the application.

1. Accepting the Application

If you're a line manager, you must:

- Initiate a contract change if required – see Table 1 for more information.
- Agree how the arrangement will work on a day-to-day basis.
- Set clear direction on team communication.
- Advise other team members of the change in working arrangement.
- Be prepared – think about any questions, comments, or challenges the team may have in advance.

2. Offering a compromise

If the original request isn't feasible, line managers should consider other options to try and support the request.

You should work with the employee to see if a compromise can be reached which will meet both the employee's needs and those of the business.

Trial Periods

- Line managers may wish to trial a flexible working arrangement by agreeing to a short-term pilot with the employee.
- Trial periods can be considered at any point within the process.
- If considering a trial period, line managers need to remember that for some employees it may be difficult to change personal arrangements at short notice (particularly for those who need to plan child or adult dependent care arrangements).
- Line managers will also need to consider the impact on the employee, who has adjusted their work life balance for the trial pilot and is then told that the arrangements cannot continue.

Further guidance on flexible working trial periods can be accessed through Ask Archie.

Declining the Application

- If after holding the meeting with the employee and considering all aspects of the application the line manager is considering declining the request, they should contact Ask Archie. Archie will ask a series of questions to explore the line manager's reasoning.
- The line manager will need to consult with the employee before they reject the request.
- If the decision is to decline the request Ask Archie will assist the line manager to prepare a formal letter to give to the employee as the decision must be given in writing, along with the appeals procedure.

The line manager will need to give a valid legitimate business reason if they're going to refuse the request, and they will need to think about their reasons carefully. Applications for flexible working arrangements can be refused only for the following reasons and the line manager must be able to explain in detail why one or more of these reasons apply:

- The burden of additional costs
- A detrimental effect on the ability to meet customer demand
- An inability to reorganise work among other employees
- An inability to recruit additional employees
- A detrimental effect on quality
- A detrimental effect on performance
- Insufficient work when the employee proposes to work
- Planned structural changes.

If the line manager is considering declining the request, they must contact Ask Archie who will assist the line manager prepare the outcome letter.

3.2.5. Submitting an Appeal

The employee may not agree with the decision that has been made by their line manager and they have the right to appeal this.

The employee can bring an appeal on a number of grounds including:

- They have something to bring to their line manager's attention that they may not have been aware of when they rejected the employee's application.
- To challenge a fact the line manager used in applying their business grounds for rejection.

The employee must appeal in writing and has 14 days to submit their appeal letter to their line manager from the date they received the decision letter.

3.2.6. Managing Appeals

- If the line manager receives an appeal letter from their employee, they should in the first instance contact Ask Archie who will provide guidance through the next steps.
- Ask Archie will advise the line manager that they have to identify an impartial Appeal Hearer. It's very important to act quickly as the Appeal Hearer must contact and arrange a meeting with the employee to discuss the grounds for the appeal. The meeting must be held within 14 days of the appeal letter being received from the employee.

3.2.7. The Appeal Meeting

Once an impartial Appeal Hearer has been identified the line manager must give them the appeal letter and the Appeal Hearer must contact the employee and arrange an appeal meeting as soon as possible. Again, the employee has right of representation and can bring a colleague or a Union representative from within the Group to the meeting.

3.2.8. The Appeal Outcome

Following the appeal meeting the Appeal Hearer must as soon as possible following the meeting, and usually within 14 days, document in writing their decision and reasons for this to the employee. The appeal hearer should contact Ask Archie for advice in relation to drafting the outcome letter. This decision is final and there are no other methods of appeal for the employee.

Information for line managers

If a formal request can't be supported, line managers need to contact Ask Archie before communicating an outcome to the employee. This is particularly important if a request is needed to support any reasonable workplace adjustments.

 Formal flexible working requests must be made through the online flexible working application form (Human Resources > Working here > Flexible Working > Tools to help you).

4. When someone wants to change their flexible working arrangement

Circumstances may change and an employee may want to make a permanent change to their current flexible working arrangement. Regardless of whether the arrangement is informal or formal and in the first instance, an employee and line manager should discuss the proposed change and identify any options which may support an employee and avoid the need to make a change, e.g., is there a short-term temporary solution.

If no solution is found, a new request will need to be submitted, either informally or through the formal process. Remember though, only two formal flexible working requests can be made in a 12-month period.

5. Flexible working and job moves

When an employee moves to a new job in a different team, their flexible working arrangement will not automatically carry across. If an employee wishes to maintain the arrangement, they should discuss this with the hiring manager as part of the recruitment process so they are clear what can/can't be supported in the new team up front.

6. When a flexible working arrangement isn't working

Line managers or employees should discuss any concerns as soon as possible if they feel the arrangement isn't working. We encourage open and honest dialogue to support both parties finding a mutually agreeable solution.

For example, if business needs aren't being met due to the working arrangement, line managers could explore asking other team members to consider a slightly different pattern that doesn't impact their contractual hours (this is not restricted to those employees who have a flexible working arrangement). In this situation however, no employee should feel pressured into changing their agreed working pattern if it doesn't suit them.

If a solution can't be agreed and a line manager is considering stopping an existing flexible working arrangement, they'll need to contact Ask Archie for advice before doing so. Cancelling the arrangement may have a significant impact on an employee who has made plans that reflect their flexible working hours.

7. General guidance and considerations

Here's some general information employees and line managers need to know when considering a request or reviewing a request for flexible working.

7.1. Holiday entitlements whilst on a flexible working arrangement

- Holidays will continue to be allocated in line with the Group's Holiday & Other Leave Policy and any local business unit holiday allocation guidelines.
- Holiday entitlements (including bank holidays) will be pro-rated according to the number of hours an employee works in the week.
- Employees who do not work a standard 7-hour day must request bank holidays off on Workday. Further information on how to do this can be found in the relevant Workday guide (Human Resources > Everyday support > Workday help).
- The Holiday Calculator will help in determining holiday entitlements for an employee on a flexible working arrangement (Human Resources > Working here > Flexible working > Tools to help you).

7.2. Pay and benefits

- Pay - employees working less than 35 hours per week will receive the pro-rated equivalent of their full time Value Account salary element.
- Benefit and Pension funding will be based on this pro-rated Value Account salary element.

7.3. Performance management

Employee performance will be reviewed solely based on their performance and contribution to the business under the usual performance management process. As such, personal goals and targets should be agreed under the process and will be in line with business unit arrangements.

7.4. Training

If an employee is scheduled to attend a training event outside of their flexible working arrangement, their working hours will need to be adjusted to reflect the scheduled times of the event. If this means additional hours need to be worked, these may be taken as time off at another time or paid as overtime (if the employee is eligible for overtime payments).

7.5. Impact on redundancy payment and/or pension arrangements

Should an employee be made redundant in the future, any change to their terms and conditions as a result of a flexible working arrangement can impact their redundancy payment and pension arrangements. Employees should consider this before making their flexible working request.

8. Home working guidance

There's a number of things to consider if a flexible working arrangement involves working from home.

As our ways of working and use of technology continue to evolve to facilitate flexibility where possible with regards to where and how we work, it is recognised that there can be increased blurring of lines between work and home life. We need to ensure that employees have sufficient opportunity to disengage from and take regular breaks from work. Striking the right balance between work and home life is important to productivity, health and wellbeing and we want all our employees to feel supported with taking the necessary steps to achieve this.

8.1. How will it work in practice?

- Home working provides employees with the opportunity to work in a more flexible manner in terms of working hours in order to meet the objectives of their job. However, it may be appropriate to agree core times when the home worker will be contactable by colleagues or external contacts. Employees must inform their line manager of their location and availability.
- Where core times are agreed for this purpose, these should be published in internal contact sheets or telephone directories where appropriate.
- It's important that line managers set a clear framework at the outset of the arrangement which includes agreeing set times and locations when they'll meet (virtually or in person) to discuss organisational developments, performance, and any other work-related issues. It's recommended that a face-to-face meeting takes place for this purpose on a quarterly basis as a minimum. However, meetings can be more frequent if needed.
- Business meetings – meetings with colleagues and/or third parties must not be conducted in an employee's home. They should be arranged for times when the employee will be working from their hub, other Group premises or conducted via audio/video if appropriate. Employees may be required to alter their working pattern in order to attend essential meetings scheduled for days when they would not usually be in the office.

- It's also important to remember they remain part of the team when arranging team social activities and events.
- Expenses – any expenses incurred when travelling to an employee's hub location at the request of your line manager e.g., to meet a line manager or to attend team events will be reimbursed.
- The costs of home utilities bills, e.g., broadband, electricity, heating will not be reimbursed.
- Employees will be expected to grant reasonable access to their home premises for the purpose of complying with health and safety standards. However, access is not an automatic right for a manager and any access should be agreed beforehand.

8.2. Insurance considerations

- The Group's liability insurance policies will be extended to cover the Group's legal liability for injury to the employee and damage to employees' personal property arising from home working.
- Employees are required to notify their home insurer and advise them of their intention to work from home.
- Any additional costs or other insurance conditions will be met by employees.

8.3. Health & Safety considerations

- For information on general H&S at home including your physical and personal safety, workstations, the DSE workstation assessment, and accident reporting please visit Useful sites > New ways of working > Support me.
- Information on Workplace adjustments can also be found in Useful sites > New ways of working > Equipment > Specialist Adjustments.

8.4. Information security considerations

Employees must not compromise the confidentiality or security of company information.

All Group Security policies and procedures will continue to apply when working from home or an alternative Group location. Failure to comply with this policy and the associated standards could result in disciplinary action.

Full details can be found in Useful sites > New ways of working > Equipment > Information Security.

8.5. What are the tax implications?

- For employees on a permanent home working contract, they should contact HMRC for further advice as they may be entitled to tax relief.
- For all other home working arrangements, it's the responsibility of employees to manage any taxation issues and the Group can't provide tax advice given each individual circumstance will be different.
- For further advice on the implications of working from home, employees should either contact HMRC directly or seek external independent advice.

8.6. What resources and equipment are provided to support home working?

- To find out what equipment is available, how to order it and how to replace it please visit Useful sites > New ways of working > Equipment.
- Where Group property/equipment is provided:
 - It must only be used for the work purposes.
 - Employees must take care of the property/equipment and report any defects.
 - Employees must return all property/equipment when they leave the Group, stop working from home, or at any other time if requested to do so.
- For the avoidance of doubt, the Group property shall remain the property of the Group and employees should not allow any other person other than themselves and any authorised representatives of the Group to use it.
- The Group will provide all stationery supplies as reasonably required by the employee to do their job.

8.7. Permanent home working

- The Group's ways of working framework and flexible working options outlined in this support pack are in place to support work life balance alongside operational business needs.
- As a result, any requests for permanent home working should only be considered in exceptional circumstances (e.g., a serious medical condition that has been confirmed by the Group's Occupational Health provider).
- Permanent home working should not be considered because an employee doesn't want to commute to their hub location or wants more home working days under the Remote First or Hybrid framework.
- Where a permanent home working arrangement is supported, the following will apply:
 - An employee's contractual base is their home and there is no designated hub, regular Group base or access to a Group building.
 - Contracted weekly hours are worked from home.
 - A permanent home working side letter will be issued, outlining the terms of the arrangement, including how contact is maintained and the expectation to grant reasonable access to the home premises for the purpose of complying with Health & Safety standards.
 - The home working agreement will state an employee's home as the normal place of business, and any expenses incurred in travelling to any office location at the request of your line manager e.g., to meet a line manager or attend a team event will be reimbursed.
 - Home utilities bills, broadband etc. will not be reimbursed by the Group.

9. Scenarios

9.1. A full-time employee asks to reduce their hours to part time on a permanent basis.

| For managers | For employees |
|--|---|
| A full-time member of my team asks to reduce their hours to part time on a permanent basis. | You want to reduce your hours from full time hours and work part time on a permanent basis. |
| <p>For example, someone who works Monday to Friday, 9am to 5pm requests to work Tuesday to Thursday, 9am to 5pm instead.</p> <p>This is a formal flexible working request.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Have a conversation with your team member to understand what they are wanting to do, the reasons for the change and the benefits it will provide if any.2. Give positive consideration to the request, balancing the employee's needs and the operational needs of the business.3. When considering the operational impacts, think about how this will work in your business area, can customer needs continue to be met, consider the wider team availability during the proposed non workdays.4. If you can agree to it, then action the reduction in hours on Workday as a WD notification will need to be issued.5. Ensure you team member understands the impact on their pay and benefits associated with a reduction in hours.6. Inform the rest of your team about the change.7. If you're unable to support the request, make sure that the reasons for the decline are communicated and meet one of the criteria outlined in Section 3 of this pack.8. Before declining the request, you'll need to contact Ask Archie. | <p>For example, you'd like to work Tuesday to Thursday, 9am to 5pm instead of Monday to Friday, 9am to 5pm.</p> <p>This is a formal flexible working request.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Talk to your line manager as soon as possible. Explain what you would like to do and why and any benefits that could be realised as a result.2. Consider the impacts on the business and how you might mitigate these.3. Submit a formal flexible working request using the online form on the flexible working intranet pages.4. If required, work with your line manager to address any concerns or operational impacts your request may create in order to reach a mutually agreeable solution that works for you both.5. Where supported, agree with your line manager a set of guidelines on how the arrangement will work in practice.6. Make sure you understand the impact on your pay and benefits.7. If agreement is reached, ensure your Workday record is updated. |

9.2. An employee asks to temporarily change their hours due to personal reasons (still maintaining contractual hours).

| For managers | For employees |
|--|---|
| A full-time member of my team asks to temporarily change their hours due to personal reasons (still maintaining contractual hours). | You want to temporarily change your hours due to personal reasons (still maintaining contractual hours). |
| <p>For example, someone may work a standard Monday to Friday, 9am to 5pm week and would like to start later at 9.30am, finish at 3.30pm and make the hours up after 5.30pm.</p> | <p>For example, instead of a 9am to 5pm working day, you'd like to start later at 9.30am, finish at 3.30pm and make up the remaining hours after 5.30pm.</p> |
| <p>This temporary arrangement can usually be agreed through the informal flexible working process.</p> | <p>This temporary arrangement can usually be agreed through the informal flexible working process.</p> |
| What you need to do <ol style="list-style-type: none">1. Have a conversation with your team member to understand what they are wanting, why and for how long.2. Give positive consideration to the request.3. Think how you can support this operationally in your business area, can meetings be done during normal operational hours, will there be any impact on customer service, can your wider team support this for a short period of time.4. If you can agree to it, agree a set of guidelines and confirm in writing how long the arrangement will last.5. Inform the rest of your team about the change.6. As this is a short-term request there is no need to have a formal arrangement | What you need to do <ol style="list-style-type: none">1. Talk to your manager as soon as possible. Explain what you would like to do, why and for how long. You should also outline how you propose to make it work, especially if there are operational impacts to consider.2. Consider the impact on the business and how you might mitigate that.3. Reach an agreement with your line manager and set guidelines of how it will work in practice.4. Make sure you keep in touch with your manager to ensure the arrangement continues to work for all parties. |

9.3. An employee who works under the Remote First Framework asks to work from the office hub more as they are presenting with a mental health issue.

| For managers | For employees |
|---|---|
| A member of my team who works under the Remote First Framework asks to work from the office hub more as they are presenting with a mental health issue. | You work under the Remote First Framework and would like to work from your office hub more to help you with your mental health. |
| <p>For example, you have a team member who usually works in the office 2/3 times a month, but they have requested to be in the office 2/3 times a week as they would benefit from the social interaction of being around others to support their mental health.</p> | <p>For example, you may live alone and are struggling with feelings of isolation being at home alone for long periods of time.</p> |
| <p>What you need to do</p> <ol style="list-style-type: none">1. Have a conversation with your team member to understand how they are feeling and how you can best support them. Remember to let them know of the support available through our Wellbeing Hub (HR > Wellbeing) and Employee Assistance Programme.2. Review the availability of desks with your leadership team to understand what capacity is available. Every priority should be given to facilitate your team members request.3. Maintain regular dialogue with your team member to make sure they feel supported and to understand if any revised arrangement is working. | <p>What you need to do</p> <ol style="list-style-type: none">1. Talk to your line manager as soon as possible. Explain how you are feeling and what would help you. If you feel comfortable talk to them about the impact the isolation is having on your mental health.2. Visit our Wellbeing Hub (HR > Wellbeing) and explore support options including support through our Employee Assistance Programme. |

9.4. An employee is asking for compressed hours, but there are already a number of team members working a compressed arrangement.

| For managers | For employees |
|---|---|
| A member of my team is asking for compressed hours, but I already have a number of team members also working a compressed arrangement and I'm not sure how to accommodate the request. | You would like to work compressed hours and do 4 longer days each week instead of 5 standard days. |
| <p>For example, you have a team of six and three members are already working a compressed week. The new request would make this four.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Have a conversation with your team member to understand what they are wanting to do, remembering you should give positive consideration to the request wherever possible.2. Consider whether the request can be operationally supported without any customer impacts.3. Consider whether compressed hours are right for your business area – refer to further information on compressed hours under Section 2.4. If the requested arrangement causes any operational gaps (e.g., Wednesday is also the non-working day of two other team members), speak to those colleagues to understand whether they can change their non-working day. Be mindful however, that no team member should be pressured into any changes if they don't want to or if it doesn't suit their personal circumstances.5. If you can agree to it, let your team member know and inform the rest of your team about the change.6. If you are unable to support the request, try and find another solution that will work for your business area and team member e.g., could they consider another non-working day or a 9 day fortnight?7. If you are still unable to find a solution that will be operationally viable then contact Ask Archie before you decline the request. If you decline the request, you will have to consult with the team member and discuss your reasons. | <p>For example, you are requesting to work your contracted hours on a Monday, Tuesday, Thursday, and Friday. Wednesday would be your non-working day.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Talk to your manager as soon as possible. Explain what you would like to do and why.2. Refer to further information on compressed hours under Section 2.3. Try and reach an agreement and set some guidelines of how it will work in practice.4. If your original request cannot be met, are there other options that you could consider i.e., a different non-workday or a 9-day fortnight.5. Consider with your line manager any other flexible working options that may support both you and your business. |

9.5. An employee is asking for flexible working arrangements to accommodate caring responsibilities.

| For managers | For employees |
|--|---|
| <p>One of my team is asking for flexible working arrangements to accommodate caring responsibilities. How can I support this?</p> | <p>You would like to work flexibly to accommodate your caring responsibilities.</p> |
| <p>What you need to do</p> <ol style="list-style-type: none"> 1. You'll need to speak to your team member to understand the nature of the caring situation, e.g., is it a short term informal arrangement they need, or is this a longer term request which would benefit from a formal request? 2. You should note that a carer's needs are different from the needs of those with access to mainstream childcare responsibilities, and the circumstances and milestones of caring may also be different. 3. Think carefully about the request and potential benefits/impact of the proposed way of working for your team member and for the business. 4. In addition to the flexible working request consideration, explain what support our Employee Assistance Programme can offer and have the phone number/website details to hand during the discussion with your team member. 5. Discuss whether leave under the Group's Carer's Leave Policy could provide further support if it's needed for longer term arrangements. | <p>What you need to do</p> <ol style="list-style-type: none"> 1. Think about what flexible working arrangement would best help to support your caring responsibilities. 2. Discuss with your line manager how the arrangement would help you and whether the request is suitable under an informal process or whether you'd like to make a request under the formal process. 3. Review all options with your line manager. 4. Consider any support that may be beneficial to you under our Employee Assistance Programme. 5. Consider whether leave under the Group's Carer's Leave Policy could provide further support if it's needed for longer term arrangements. |

9.6. How does a job share arrangement work?

| For managers | For employees |
|--|---|
| <p>I have a vacancy in my team and want to consider a job share arrangement</p> | <p>I am a part time employee and want to apply for a full-time job but as a job share</p> |
| <p>What you need to know</p> <ul style="list-style-type: none"> • There are two ways a job share can come about: <ol style="list-style-type: none"> 1. You have someone in the job already who is asking to move to part time and job share their full-time job. | <p>What you need to know</p> <p>If the job is advertised as full time and you wish to apply for it, in the first instance you should have a conversation with the hiring manager to see if they would consider the job on a job share basis.</p> |

2. You have a new vacancy, and you are happy to consider it as a job share job.

- Once the feasibility of the job-sharing arrangement has been established, the next step is to ensure that the right people are selected to share the job.
- The Group will provide support in searching for another partner where the request has been lodged by a colleague already in the job and wishing to job share or where a current job share partner wishes to leave the job share arrangement. This can be done by:
 - Enquiring if the applicant knows someone who is interested in setting up a job share.
 - Advertising internally and externally for a job share partner.
- If you have a full-time vacancy and will consider a job share arrangement, then the applicants must submit their application. You do not have to help search for a job share partner but if you know of any, and they are happy for you to share their information, then discuss these with anyone who expresses interest.

Recruitment

- As with other full time and part time applicants, candidates who apply for a job share must be compared against a person and job specification to make sure that the most appropriate individual is selected.
- The most important aspect of a good job share arrangement is the compatibility of the job sharers' working styles and skills. Employees who have worked together previously and know each other's strengths and weaknesses can often be strong candidates for job share positions.
- It is also highly advisable that job sharers meet before assuming their duties.

Holidays or sickness absence

- Job share partners do not need to cover each other's holidays or sickness absence unless otherwise stated in their contract of employment, although the job share partners and line manager may agree to do so.

Communication between job sharers

- Effective communication is key to the success of a job share arrangement - both in terms of the job share partners themselves and

If they are happy to do this and you feel you have the skills and experience for the job then you need to find a job share partner. There are a few ways to do this:

- Find a job share partner from your professional network.
- Use the Job Share Workplace group to connect with other employees who are interested in job sharing.
- Ask the hiring line manager if they know anyone who might consider a job share arrangement and has the necessary skills.

Key things to understand if you are successful in your application and start a job share arrangement

- Unless stated in your contract of employment or agreed with the line manager, you do not need to cover each other's holidays.
- Effective communication (between job sharers, colleagues, line managers, customers) is critical to the success of your job share arrangement and you should develop a communications plan clearly setting out how this will be carried out. Alongside this, both partners should regularly set aside time to discuss workloads and to talk about any problems or issues that might arise.
- If your job-sharing partner withdraws from the agreement further down the line you will be offered, subject to satisfactory performance, their hours on a full-time basis. If this arrangement is unacceptable to you, then another partner will be sought.
- If no partner is found within a reasonable timescale, it may be necessary to end the job share. In such circumstances your line manager, will be required to take all reasonable steps to find alternative part time work for you at the same level.
- If no such vacancy arises, then you may be asked to accept part time work at a different level.
- Whilst job sharers are responsible for ensuring that the duties attached to the job are carried out, they are individually responsible for their own performance. Consequently, you should have your own individual performance reviewed in the same manner as all other employees.

between the job sharers and their colleagues, managers, and customers.

- A communications plan should be developed, clearly setting out how communication will be carried out between the job sharers and you, their line manager, their colleagues, and their internal and external customers.
- Where a job share is established both partners should regularly set aside time to discuss workloads and to talk about any problems or issues that might arise.
- As a Line manager, you should also make sure that the practical implications of the job share are explained within the branch or department (e.g., overlap periods, communications, and decision-making).

What happens if one of the job-sharing partners withdraws from the agreement?

- When this happens, the hours of work previously undertaken by that person should be offered, subject to satisfactory performance, to the remaining job sharer on a full-time basis. If this arrangement is unacceptable to the remaining sharer, another partner will be sought.
- If no partner is found within a reasonable timescale, it may be necessary to end the job share. In such circumstances you, the line manager, will be required to take all reasonable steps to find alternative part time work for the remaining job sharer at the same level.
- If no such vacancy arises, the employee may be asked to accept part time work at a different level. In this circumstance, you should contact Ask Archie.

Performance management of job sharers

- Whilst job sharers are responsible for ensuring that the duties attached to the job are carried out, they are individually responsible for their own performance. Consequently, job sharers should have their individual performance reviewed in the same manner as all other employees.

9.7. An employee going through the menopause would like to vary their hours.

| For managers | For employees |
|---|--|
| <p>You have an employee who has told you they are going through the menopause and is experiencing insomnia. They are struggling in the mornings and have requested to vary their hours.</p> | <p>As a symptom of the menopause, you are experiencing insomnia and are struggling in the mornings. You're considering a request to vary your hours to start later in the morning.</p> |
| <p>What you need to know</p> <p>The menopause can be a subject that is rarely discussed in the workplace. Everyone's experiences are different, but for many women the physical and emotional symptoms they experience can have an impact on working life.</p> <p>Flexible working is therefore a positive way to provide support to employees as they manage their symptoms.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Have a conversation with your team member to understand what they are wanting (e.g., a delay of 30 mins or an hour to their morning start time) and for how long they would like the arrangement to last. Note however it's unlikely there will be a pre-defined 'end period' to their symptoms and maintaining regular dialogue with your team member will be important.2. You should give positive consideration to the request considering how you may accommodate it, considering impacts on the business, other team members and customers.3. Guide your team member to the Menopause Moments that Matter support document available on our Wellbeing Hub (HR > Wellbeing).4. If you're able to support the request, set out mutually agreeable guidelines for how it will work in practice.5. Inform the rest of your team about the change but ensure you don't share the reason for the arrangement. | <p>What you need to know</p> <p>The menopause can be a subject that is rarely discussed in the workplace. Everyone's experiences are different, and we understand that the physical and emotional symptoms experienced can have an impact on working life.</p> <p>We encourage you to consider flexible working as a positive way to provide you with support as you manage your symptoms.</p> <p>What you need to do</p> <ol style="list-style-type: none">1. Talk to your line manager as soon as possible. Explain what you would like to do, for how long and how you propose to make the arrangement work.2. If your request can be supported, set out mutually agreeable guidelines for how it will work in practice.3. Make sure you maintain open dialogue with your line manager to ensure the arrangement continues to work for all parties.4. Read the Menopause Moments that Matter support document available on our Wellbeing Hub (HR > Wellbeing) which provides further support and information to help you. |

9.8. An employee wants to work from home on a permanent basis.

| For managers | For employees |
|--|---|
| You have an employee who wants to work from home on a permanent basis. | You want to work from home on a permanent basis. |
| <p>What you need to know</p> <ul style="list-style-type: none">• Permanent home working is only considered in exceptional circumstances (e.g., a serious medical condition supported by the Group’s Occupational Health (OH) provider).• It won’t be supported in instances for example, where an employee doesn’t want to commute to their designated hub or has made a personal choice to move a distance away from their designated hub.• We’ve taken this decision because our ways of working framework (i.e., office first, hybrid remote first) defines how we want to work which balances meeting customer needs and other operational demands as well as maintaining our ability to connect to each other face to face in our teams, helping to facilitate collaboration and share knowledge, experiences and learnings.• Permanent home working does not form part of this framework. <p>What you need to do</p> <ol style="list-style-type: none">1. Have a conversation with your team member to understand why they wanting to work from home permanently.2. Where a serious medical condition is given as the reason, you’ll need to contact Ask Archie to initiate an OH review.3. Where the reason is not driven by a medical condition, you’ll need to explain the business rationale for adopting the applicable ways of working framework for your business and how this supports operational needs and effective ways of working in your team.4. You may want to consider whether you’re able to support changes to the current working arrangement, for example, if your team works under the remote first or hybrid framework, are you able to consider increasing the number of days at home. Bear in mind that if you consider it for one person you should give the same consideration to other team members who request it.5. In addition, you should discuss with your team member any flexible working options outlined in this support pack which they may want to | <p>What you need to know</p> <ul style="list-style-type: none">• Permanent home working is only considered in exceptional circumstances (e.g., a serious medical condition supported by the Group’s Occupational Health (OH) provider).• It won’t be supported in instances for example, where an employee doesn’t want to commute to their designated hub or has made a personal choice to move a distance away from their designated hub.• We’ve taken this decision because our ways of working framework (i.e., office first, hybrid remote first) defines how we want to work which balances meeting customer needs and other operational demands as well as maintaining our ability to connect to each other face to face in our teams, helping to facilitate collaboration and share knowledge, experiences and learnings.• Permanent home working does not form part of this framework. <p>What you need to do</p> <ol style="list-style-type: none">1. Review the Group’s position in relation to permanent home working requests as outlined in this support pack.2. Where you believe you have a serious medical condition which a permanent home working arrangement would support, talk to your line manager as soon as possible to explain your circumstances.3. Participate in the OH review, as this will help us understand more about your needs and how we can best support you.4. Where your request has been supported, make sure you maintain open dialogue with your line manager to ensure the arrangement continues to work for all parties.5. If your request isn’t supported, work with your line manager to look at any flexible working options you may want to consider instead. |

consider instead to support more time at home, for example, moving to part time hours.

6. Where the OH report supports a permanent home working arrangement, Ask Archie will provide the relevant side letter outlining the agreed arrangement and you'll need to issue this to your team member.

9.9. An employee is no longer eligible for term time working.

| For managers | For employees |
|--|--|
| <p>You have an employee who currently works term time but their child(ren) is no longer at school.</p> | <p>You currently work term time but your child(ren) is no longer at school.</p> |
| <p>What you need to know</p> <p>Term time working is only available while an employee's child/children are at school. Once they complete their school years, other flexible working arrangements should be considered e.g., part time hours</p> <p>What you need to do</p> <ol style="list-style-type: none"> 1. Invite your team member to a meeting to explain why term time working is no longer applicable to them and discuss potential new working arrangements. During the meeting take notes to ensure all conversations are recorded. 2. Give consideration to various options, balancing the employee's needs and the operational needs of the business. 3. Give the employee time to consider the(se) option(s). 4. Have a follow-up meeting to discuss the options presented and agree which schedule will work best for both parties. 5. If you can agree, then action the change in hours on Workday. 6. Ensure you team member understands any impact on their pay and benefits associated with the change in hours. 7. Inform the rest of your team about the change. 8. If you're unable to reach an agreement on a new working arrangement, you'll need to contact Ask Archie. | <p>What you need to know</p> <p>Term time working is only available while an employee's child/children are at school. Once they complete their school years, other flexible working arrangements should be considered e.g., part time hours.</p> <p>What you need to do</p> <ol style="list-style-type: none"> 1. Your manager will invite you to a meeting, due to your child(ren), no longer being in school. As part of the meeting, you'll both discuss potential new working arrangements. 2. You'll be given time to consider the options, balancing both your needs and the operational needs of the business. 3. You'll then be invited to a follow-up meeting to discuss the options presented and agree which working arrangement works best for both parties. 4. If you agree to a new arrangement, your manager will update your hours in Workday. 5. Your manager will help you understand any impact on your pay and benefits associated with the change in hours. 6. If you're unable to agree on a suitable work schedule, your manager will need to contact Ask Archie to discuss the case further. |