**Manager checklist**Ensure you have read and are familiar with the details in the Agile Working Policy/FAQs before the meeting.

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Pre-Meeting Action** | | **Done/ discussed** |
|  | Has an application for Agile working been made?  As part of your preparation, should you have any concerns or questions prior to the meeting please discuss with HR Direct. This includes when reviewing working arrangements/patterns for individuals whose job has changed. |  |
|  | Review Agile request and arrange and book a meeting with the applicant if applicable to discuss. |  |
|  | Ensure there is an appropriate confidential space available for your meeting or confirm details if to be held by phone. |  |
|  | If the proposed change is because of an illness or medical condition then the [Workplace Adjustment Policy](https://peoplefirst.nhsbt.nhs.uk/NHSBT-DOCUMENT-LIBRARY/PoliciesandSupportingDocs/Policy-Workplace-Adjustments-Policy.pdf) will apply. |  |
|  | Have any relevant documents available for the meeting, for example job description and person specification. Any previous application/outcome letter. |  |
|  | If the application cannot be fully accepted, discuss compromise or alternative options (include any trial period if required). |  |
|  | **If the application is agreed** |  |
|  | For **Hybrid working**, establish and agree a communication a plan/protocol for when employees will work from the office and when they will work remotely. Where possible, try to ensure that all employees spend some time in the office and some time working from home, possibly on a rota basis as well as spending time together face to face as a team. Consider if days in the office are fixed or if these vary from week to week/month to month. Do all the team need to attend face to face monthly team meetings, to maintain connectivity with all the team. Is it preferable to have a mix of face to face/virtual one to one’s with the team.  For **Home working**, ensure that supportive arrangements are in place, for example agree the level and type of contact – face to face, meetings via Teams etc and that the required equipment is available. The Agile FAQs provide further advice. |  |
|  | Provide clarity to the team on their level of autonomy relating to hybrid working. For example, are individuals allowed to schedule their own hybrid days or are there reasons why they may be required to work a specific number/pattern of days. |  |
|  | Has the office a desk booking system/clear desk policy/adequate equipment in the office, if not do you need to order equipment? For more information visit the [Desk and Room Booking page](https://nhsbloodandtransplant.sharepoint.com/sites/COVIDHomepage/SitePages/Book%20a%20desk%20or%20meeting%20room.aspx) and the relevant [FAQ’s](https://nhsbloodandtransplant.sharepoint.com/sites/COVIDHomepage/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FCOVIDHomepage%2FShared%20Documents%2FDesk%20Booking%2FDesk%20and%20meeting%20room%20booking%20faqs%2Epdf&parent=%2Fsites%2FCOVIDHomepage%2FShared%20Documents%2FDesk%20Booking) relating to hybrid working. |  |
|  | Is there access to car parking or does this need to be arranged? |  |
|  | All flexible working applications related to agile working should be accompanied by a [Workstation Assessment](https://nhsbt.service-now.com/sp?id=sc_cat_item&sys_id=2239cbc91b0d789027cceb91b24bcb67&sysparm_category=51a6c89237ed130080f519a543990e3c), and all applications for home working should also include a [Home Working Self-Assessment Checklist](https://nhsbloodandtransplant.sharepoint.com/:w:/r/sites/ControlledDocumentsLibrary/_layouts/15/Doc.aspx?sourcedoc=%7B7F2CE070-3368-4C21-BEFC-6668A8A54A93%7D&file=FRM1380.doc&action=default&mobileredirect=true&DefaultItemOpen=1&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjExMzAwNDEwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D&cid=de900034-7302-40f8-97fe-1de35efdf255). This ensures that you have a suitable space at home, or in the office, to work comfortably and safely, as well as the equipment needed to do your job effectively. |  |
|  | Arrange for the provision of any appropriate equipment needed by the individual to ensure they can work securely, effectively and safely for both home and hybrid working. |  |
|  | Ensure the employee understands that any agreed change will be permanent, unless agreed for a fixed period of time. |  |
|  | You will receive a Service Now email request to ‘Approve’ / ‘Approve with changes’ for your employee and you must also confirm in a letter (available on [People First](https://peoplefirst.nhsbt.nhs.uk/Policies/flexible-working-templates.htm)) to the employee with details of your decision.  You will also receive a further Service Now email advising you for hybrid working requests that you will not need to formally record on ESR/Easy/Nextra but you will need to work with the employee to ensure the agreement is being followed.  For home working applications only, your PCP (People & Culture Partner) will receive an email and be required to provide final approval or rejection of the request. If approved, you will need to complete a [contractual changes form](https://peoplefirst.nhsbt.nhs.uk/Employee-Changes/update-employee-details.htm) to amend the employees contractual employment base. |  |
|  | Arrange a follow up review meeting to find out how the agile arrangement is working in practice. |  |

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| **Review Meeting** | | **Done/ discussed** |
|  | Confirm reason for the meeting is to discuss and review the employee’s Agile application. |  |
|  | Has there been any impact on department and/or colleagues set out in application. |  |
|  | If on a trial basis confirm outcome (if applicable). |  |
|  | Consider and agree any extension to the timescale of the application/process if appropriate. |  |
|  | **If the application is declined** |  |
|  | Should the outcome be that the application is refused - you must provide full operational reasons for this and confirm in a letter (available on [People First](https://peoplefirst.nhsbt.nhs.uk/Policies/flexible-working-templates.htm)) to the employee with details of your decision. |  |
|  | Confirm the appeal process – please see [Flexible working policy](https://peoplefirst.nhsbt.nhs.uk/Policies/flexible-working.htm) for the appeal process. |  |
|  | Comments: |  |