Agile Working Policy

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Ratifying committee or executive director	Transforming Our Culture and Staff Experience	
Date ratified	February 2023	
Next anticipated review	February 2024	
Executive director	Executive Director of Strategy, People and Partnerships	
Policy lead	Head of People and Culture	
Policy author *(if different from above)*	People Partner	
Exec Sign off Signature (electronic)	*Patrick Nyarumbu*	
Disclosable under Freedom of Information Act 2000	Yes	

Policy context

The Trust supports the principle of achieving a work/life balance for all employees and this includes giving employees the opportunity to work more flexibly whenever practicable. Furthermore, there may be social, economic, and/or environmental impacts which may result in a service or the Trust considering maximising an opportunity for home working, to deliver value for both staff and the Trust.

Policy requirement (see Section 2)

The agile working policy has been created to support existing Trust policies and to encourage the consideration and introduction of hybrid working patterns where it meets the business needs of the service, as well as employees' individual needs to ultimately ensure continued delivery of safe and high-quality care and support our service users. Agile working is open to all employees, substantive and fixed term based on agreement with line management and where service user needs are not compromised

1: Introduction:

1.1 Rationale (why):

Birmingham and Solihull Mental Health Trust recognises the need to develop modern agile working practices to maximise performance and productivity, whilst supporting employees to maintain a good work life balance and improve their experience of working in the Trust. Additionally, there is strong evidence that indicates that progressive employers that embed good agile working practices improve the recruitment and retention of their employees.

1.2 Scope (when, where and who):

New technologies make it easy to access information remotely and work from a variety of locations whilst promoting more joined up services.

Agile working has several benefits associated with it:

2   Realisation of financial and productivity gains
3   Improvement in supporting work life balance
4   Improvements in service developments and delivery
5   Attracting and retaining employees
6   Better use of time and convenience
7   Freedom from transport problems and environmental benefits

Agile working aligns to the Trust's vision for development i.e., placing emphasis on the importance of sustainable economic growth and the health and wellbeing of its employees. The benefits of improved work life balance and reduced travel makes a direct contribution to this. The concept of agile working gives employees the ability and the equipment to carry out their role securely, efficiently, and successfully in different locations across the geographical area in which they work.

BSMHFT acknowledges its responsibility in developing and maintaining workspaces to support agile working across its estate. This includes the installation of furniture and IT systems to enable employees to hot desk in pre-determined and specifically agreed locations throughout our estate.

Agile working provides employees with more options regarding where and when they undertake their roles. This works by introducing an element of choices including working at premises owned by the Trust combined when appropriate with home working. Agile working also allows employees to influence how they carry out their role and promotes varying levels of flexibility within the workplace.

This policy provides a framework for consistent and fair practice on the issues to be taken into account when considering agile working arrangements.

The aim of this policy is to define agile working for those employed by the Trust in substantive and fixed term contracts both on Agenda for Change and Medical Contracts where appropriate. This policy does not negate or supersede the Trust's Flexible Working Policy that already exists for use by all employees.

It is accepted that not all jobs or employees may be suitable for agile working. Some jobs are intrinsically not suitable (e.g., ward-based employees or some other clinical roles)

and some proposed arrangements may not be considered safe and secure. Line managers should consider each situation on its own merits, applying the principles of fairness and consistency whilst ensuring that overriding business needs and other requirements can be appropriately met.

1.3 Principles (beliefs):

Our values of compassion, inclusion and commitment describe our core ethics and principles. They guide our culture and are underpinned by our everyday behaviours.

2: The policy consisting of:

This policy has been developed to set out how employees can work in an agile way from any location. For example:

- Trust Premises with hot desking facilities
- Other NHS locations and offices
- Public sector organisations
- Partners, stakeholders, or shared service providers
- At home
- Any combination of these

Agile working is the term used by the Trust to describe how employees can use mobile devices to work flexibly from different locations at different times.

2.1 Key Trust principles for agile working

The Trust has agreed several principles which form the foundation of this approach.

These are:

- We will promote and encourage working in an agile way and our buildings, IT approach, and management style will support it. Agile working will be the default option for most of our corporate roles, and this policy will greatly influence our estate strategic planning and operations
- The leadership teams will encourage active conversations with their employees on the principles of agile working as described in this policy

- Agile working is an approach in which an organisation empowers its people to work where, when, and how they choose. This gives employees maximum flexibility and minimum constraints to optimise their performance

Where employees are identified as being agile, managers must talk to them to agree how this will work and what steps are required to ensure business needs are met.

Employees are requested to use **Appendix 2** to formalise agile working if they think that the location condition of their employment arrangements can be transferred from fixed base to agile. Should this request not be agreed by line management and the employee feels that this is unreasonable, they should raise their concerns initially with their line manager's manager.

Each case will be assessed on a case-by-case basis, for example where disabilities and personal circumstances will be taken into consideration.

If the employee is still not satisfied, then they should contact the People Team regarding next steps by contacting **bsmhft.hrsupport@nhs.net**.

Following further discussion, if the employee still feels resolution has not been reached after exhausting all informal routes, they can follow the Trust Grievance Policy. Employees are also reminded they can discuss any concerns with their Trade Union representative.

2.2 Identified benefits of adopting agile working

For the Trust agile working can:

- Support continuity of service and the efficient functioning of the Trust
- Reduce time lost through travelling
- Support recruitment and retention of skills and experienced employees
- Support Partnership working
- Improve cost effectiveness

In addition, the introduction of agile working will be of benefit to employees in the following ways:

For employees agile working can:

- Enable them to work more effectively
- Provide a solution to a temporary problem where travel to specific base is not possible
- Reduce the time spent travelling
- Enable autonomy for employees to work in a way that suits their needs and improves their work/life balance.
- Enable flexibility in working hours/location which will provide greater coverage of 'business hours' across the working day

2.3 Definition

"Agile Working"

Agile Working is the term used to describe how employees can work effectively from any location, whether it is from a Birmingham and Solihull Mental Health NHS Foundation Trust building, within the community and client sites or by varying degrees of home working and regular hot-desking.

3. The procedure:

Line Managers/Service and Team Managers are responsible for ensuring that within their areas of their responsibility:

- Agile working is promoted, and that employees are provided with appropriate support and equipment.
- The on-going wellbeing of employees should be monitored and regularly reviewed during supervision
- All employees are briefed and should work to as part of a team and those working in an agile manner continue to receive regular supervision in line with Trust policy.
- All staff who work agile working must have a Self-Assessment checklist completed, to ensure all are working safely.

The Line Manager and employee should consider the following points before agreeing an agile working agreement:

- Whether this policy is applicable or whether an alternative policy may be more appropriate, for example, the Trust's Flexible Working Policy.
- Whether the business needs of the Trust can be best met if an agile working arrangement were to be agreed.
- Whether any additional equipment may be required and whether this is financially feasible.
- Whether the employee will be adequately contactable. As a minimum employees should be contactable by email, telephone, and MS Teams (video calling) during working hours.

If an employee's request to work agilely is not agreed or stopped, the line manager should confirm this as soon as is reasonably practicable to the employee, providing a rationale for the rejection/cessation of the request. The line manager may wish to seek advice from the People team in such instances.

Line Managers should regularly review their team/individual agile working to ensure it is beneficial to both the Trust and the team/individual.

The office/team should be aware each working day of an employee's whereabouts and how they can be contacted. Diaries should be shared with colleagues and Line Managers and reflect employees working hours, whereabouts and agreed periods of leave. Employees should liaise with colleagues and/or management to update diaries that cannot be accessed. Employees should call or attend a Trust site at times agreed with their Line Manager.

It is the responsibility of each employee to adhere to this policy. Implications for deliberate loss/damage to any equipment or failure to comply with this policy may result in disciplinary action.

All employees are required to undertake the annual mandatory information governance training in accordance with the Trust's information governance policies. Given potentially increased risks to confidentiality arising from agile working, failure to complete the required training may result in mobile equipment access being withdrawn until the training has been completed.

Employees should raise any concerns arising from agile working arrangements, including health and safety and information governance concerns to their Line Manager, however minor.

3.1 Communication and Support

In an agile working environment communication becomes even more vital to ensure the Trust can provide safe and effective services. It is recognised that there are several communication methods available, and employees have their own preferences. Managers, employees, and teams should adapt their methods of communication to encourage open and frequent information sharing, and that their employees remain updated on both team and corporate developments.

Employees may become detached from their manager and teams and technology such as video calls on Teams and Video Calling Technology can play a vital role in ensuring communication channels remain open. Teams can be adopted to supplement and replace some traditional face to face meetings, reducing travel to base and creating more 'time to care' for employees. However, it is essential that time is built into enable face to face meetings and communication to take place at an appropriate level.

Managers should be aware that some employees may be uncomfortable with change, feeling the loss of a permanent desk and the reduced face to face contact with colleagues. They will need extra support to get used to the new ways of agile working. Agile working may not be appropriate for all employees and managers should be vigilant for early warning signs that a team member is not working well. Both managers and employees must be willing to engage in joint problem solving and troubleshooting to ensure that the agile working arrangements work effectively. Both parties are responsible for maintaining good working relationships.

Employees will comply with the site rules relevant to the location they are working from. To facilitate agile working the Trust has put the following in place:

3.2 Desk booking

If the employee chooses to work within an office environment outside of the dates and times that have been agreed within the formal agile working arrangement, the Trust has a booking system across all Trust sites where rooms can be booked via Ubook.

As the organisation is operates from multiple buildings and employees have the flexibility to work from any location, it is difficult to predict demand for spaces (including desks). Therefore, a booking system allows employees to book the space needed for the time required and ensures they have a guaranteed desk.

The Trust can use data from the booking system to track utilisation levels of all the different bookable spaces. The Trust can use this information to ensure they respond to

employees need, as their requirements evolve, and as they become accustomed to agile working.

Note: During times where hot-desking is not advised, such as a public health pandemic or for specific health and safety requirements, this system may be reviewed.

3.3 Meeting rooms

Bookable on-site meeting rooms will be available on majority of Trust sites, as well as informal meeting/discussion areas. This will be facilitated via Ubook system and promote teams working within the same vicinity.

3.4 Remote Working

The nature of work for some Trust employees is that they will visit services in a variety of locations, and it will often be more efficient for employees to travel direct to a location without the need to attend the office beforehand.

The Office 365 systems will enable an employee to access their documents, emails etc. and be able to effectively work from any office or location with internet access. An employee member's contractual office location will remain their main site for work.

3.5 Homeworking

Agile working will include times when employees work from home. Ad hoc homeworking arrangements will need to be agreed and authorised in advance by the Line Manager. Employees should be contactable during the working day via email, telephone and video calling when they are working from home. Managers have the right to require a member of staff to attend a Trust site at any time (some level of reasonable notice considered, taking personal circumstances into consideration).

Employees should maintain a designated and adequate workspace in which to work and must be made aware of and comply with their own responsibilities, under health and safety legislation including the responsibility for establishing and agreeing working conditions when away from an established office site.

The Trust cannot be responsible for any injury to any other person at the employee's home workplace.

It is not appropriate to hold face to face meetings with colleagues, service users or with those outside of the organisation within the home environment. Face to face meetings must only take place on Trust premises and rooms should be booked via the Trust Ubook system.

The Trust is not responsible for the cost or maintenance of home telephones, broadband services, or other related services not provided by the Trust.

Employees may be able to claim tax relief for additional household costs if they have to work at home for all or part of the week. Employees should follow the following link:

Https://www.gov.uk/tax-relief-for-employees/working-at-home

There may be a need for employees to print off documentation to carry out their role effectively, however in most cases the Trust encourages employees to use digital copies.

Where this is not possible, employees are expected to go into one of the Trust locations to print and dispose of confidential waste.

3.6 Designated base and claiming expenses

All employees will have a Trust location for the purposes of claiming mileage associated with work related activities. This site will be identified within the contract of employment and facilities will be available to work from the site, in line with hot desking and room booking facilities.

A permanent desk will not be allocated unless it is by way of reasonable adjustment in line with the Equality Act and on agreement with the line management.

Mileage Expenses will be reimbursed in line with NHS Terms and Conditions.

The Trust's existing process for mileage claims still applies and must be followed when processing travel expenses. Employees will continue to have a designated site which must be used for mileage claim calculations. Further information on claiming travel expenses can be found on the Trust Intranet page.

3.7 IT & Display Screen Equipment (DSE)

To support existing homeworking arrangements, employees may request office equipment to be allocated to them from the Trust including ergonomic chairs, footstools, and I.T. equipment. This provision complements the Trust's agile working policy as well as existing policies including health and safety and the flexible working policy. Employees that require any additional equipment must have management and budgetary approval.

As per existing policies, employees must take responsibility for undertaking an additional DSE assessment to make sure their home workstation is fit for purpose and must take reasonable care of the equipment to prevent damage or loss.

In the event that an employee leaves the Trust they must return the equipment that has been provided to them, and this will form part of the leaving process undertaken by the Line Manager ensuring that all equipment has been returned by the final working day.

Failure to do this may result in the cost of the equipment being converted to a monetary value and referral to a debt management team. The Line Manager will write to the employee in the first instance, following advice from the People Team, and will confirm the amount to be recouped and how this can be repaid.

3.8 Confidentiality

As per Trust policy all employees should take sensible precautions with sensitive information and hold only the minimum level of confidential information remotely which allows them to undertake their role. The practicalities are that employees who work in open plan offices will see and hear sensitive information from time to time. However, all employees must be conscious of their professional and contractual obligations to always maintain confidentiality and to not repeat confidential information, either to their colleagues

or to those outside the organisation, and to do so may result in disciplinary action being taken.

Any telephone or face to face discussions of a highly sensitive nature should be held in a private area. Please note that trains, coffee shops, corridors, stair wells, kitchen areas, etc. do not constitute confidential areas, and in addition to Trust employees overhearing conversations, they may be heard by members of the public or employees of other organisations, and people within the home environment.

The Trust discourages employees from working in public places unless confidentiality is guaranteed.

All employees are required to comply with the Trust's policies on information governance that are listed in section 6 of this document.

3.9 Personal Health and Safety Applicability to Agile Working

Before undertaking agile working out of the Trust's offices, employees should ensure that they have read and are familiar with the Trust Health and Safety Policy and Trust Confidentiality Policy.

If employees are working agilely i.e., Working from home or other non-office locations for extended periods of time (more than one day) they should discuss their working arrangements with their line manager.

All employees undertaking work out of the Trust offices should ensure that they are working in an environment which protects them from musculoskeletal injury.

Any employees working from home should check their home insurance terms and conditions before carrying out any work at home.

Risk Assessments must be carried out for all activities undertaken whilst working at home. All significant risks must be recorded, and measures put in place to reduce the risk to the lowest level so far as is reasonably practicable.

It remains the manager's responsibility to ensure these assessments are in place and employees are expected to complete and return **Appendix 2 and 3** of this policy.

All lifting and handling should be done in compliance with the Trust's Health and Safety Policy.

All documents and mobile devices should be secured in the home environment and not left in vehicles overnight.

3.10 Absence Reporting

The Trust's Sickness Absence Policy applies to all employees regardless of their workstyle and you should, therefore, continue to refer to your own department's reporting arrangements if absence from work.

3.11 Reporting Security Incidents and Weaknesses

Any breach of confidentiality, loss, theft or damage to documentation or mobile devices should be reported as soon as possible to the ICT Service Desk and the Information Governance Team through the Trust switchboard number.

In addition, such incidents must be reported through the Trust Incident Reporting System without delay to ensure required action is taken urgently.

4: Responsibilities
This should summarise defined responsibilities relevant to the policy.

Post(s)	Responsibilities	Ref
All Employees	All employees and workers are responsible for ensuring that the Trust meets its legal obligations and for the adoption of, and compliance with, internal and external governance requirements.	
Line Managers	Line managers are responsible for determining eligibility for agile working within their team or directorate and have the ultimate responsibility for deciding whether an employee is authorised to undertake agile working on an equitable and fair basis. Line manager's decisions in these matters will be final, unless it can be evidenced that the Manager has refused agile working unreasonably. Employees should refer to the Trust's Grievance Policy in this case.	
Policy Lead	Managers are provided with advice and support in relation to Human Resources (HR) issues in the application of this policy, ensuring that fairness and consistency of the policy are applied.

Supporting managers and employees to develop and promote a culture of agile working and those barriers to agile working are identified and reduced. | |
| Executive Director | The Chief Executive Officer has ultimate responsibility for the implementation of the provisions of this policy. As the 'Accountable Officer' they are responsible for the management of the organisation and for ensuring that the appropriate mechanisms are in place to support service delivery and continuity. | |
| Others… | Overall responsibility for the security of information lies with the Senior Information Risk Owner (SIRO). They will delegate the responsibility for managing the | |

development and implementation of procedural documents to the information governance team and line managers within the Trust.

The Trust's Data Protection Officer is responsible for ensuring that the Trust is accountable for data protection and compliant with the General Data Protection Regulations and Data Protection Act 2018.

The Trust's Information Governance Team will provide expert support and advice to the organisation and to employees on all matters related to confidentiality, information management and security of information.

5 DEVELOPMENT AND CONSULTATION PROCESS

Consultation summary	
Date policy issued for consultation	December 2022
Number of versions produced for consultation	5
Committees / meetings where policy formally discussed	**Date(s)**
JOSC	10 August 2022 & 7th December 2022
TRUST WIDE CONSULTATION VIA CONNECT	15 December 2022
• EDI GROUPS • WELLBEING GROUPS	15 December 2022
PDMG	11 January 2023
TC&SE	2 February 2023

Where else presented	Summary of feedback	Actions / Response
JOSC	Feedback received from staff side chair and colleagues	Included
30-day Trust wide Consultation via Connect, and via staff networks	Feedback received from Trust colleagues and staff networks	All included and wording amended
PDMG	Feedback received	Included

6: Reference documents

This policy should be read in conjunction with the following documents:

- Acceptable Use Policy
- ICT Policy
- Care Records Policy
- Confidentiality Policy
- Corporate Records Management Policy
- Disciplinary Policy and Procedure
- Flexible Working Policy
- Grievance Policy
- Health and Safety Policy
- Information Governance Assurance Policy
- Lone Working Policy

7: Bibliography:

Health and Safety Executive's guidance: Working safely with display screen equipment and HSE guidance for Employers on Health and Safely for homeworking.

Working safely with display screen equipment: Overview - HSE

https://www.hse.gov.uk/home-working/index.htm

8: Glossary:

This gives the effect of working directly onto the network in the workplace and depending upon what access rights are given, access to emails, files and SharePoint can be made. For email the possibility of using web mail is available.

- DPA - Data Protection Act 2018
- DPO - Data Protection Officer
- GDPR - General Data Protection Regulations
- IAA – Information Asset Administrator.
- IAO – Information Asset Owner.
- Information Governance - the management of information within an organisation
- Mobile device - any item of portable IT equipment, including telephones, laptops, and tablets.
- Occasional home working – ad hoc intermittent working from home, which does not give rise to a contractual right to set working from home patterns
- PID – Personal Identifiable Data.
- PCD – Personal Confidential Data.
- Security Incidents - If any sensitive information is lost or accessed by a third party, or if a mobile device is lost or stolen this should be reported by telephone to the Trust's Information Governance team and the ICT Service Desk as soon as possible, in addition to being reported on the Trust's incident reporting system.
- SIRO – Senior Information Risk Owner.

9: Audit and assurance:

The policy and procedure will be reviewed periodically by the People Team in conjunction with operational managers and Trade Union representatives. Where review is necessary due to legislative change, this will happen immediately. What steps will be undertaken to assess how well the policy is working.

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Grievances relating to the declining of agile working requests	Head of People and Culture (or delegated deputy)	Case tracker	Annually	People Committee
Compliance with self-assessments for agile working	Head of Health & Safety & Regulatory Compliance	Application form review	Annually	People Committee
Incident Management	Head of Information Governance	Eclipse	Annually	People Committee

10. Appendices consisting of:

Additional material that is necessary to the delivery of the policy or procedure, e.g., flowcharts
- **Appendix 1 - Equality Impact Assessment**
- **Appendix 2 – Agile Working Agreement Form**
- **Appendix 3 – Self Assessment Check List**
- **Appendix 4 – Employment Log**

Appendix 1
Equality Impact Assessment

A word version of this document can be found on the HR support pages on Connect
http://connect/corporate/humanresources/managementsupport/Pages/default.aspx

Title of Proposal	Agile Working Policy		
Person Completing this proposal	Jo Munns,	Role or title	Head of People and Culture
Division	People Team	Service Area	Human Resources
Date Started	27th July 2022	Date completed	27th July 2022

Main purpose and aims of the proposal and how it fits in with the wider strategic aims and objectives of the organisation.
To support the adoption of agile working to support work life balance across the Trust, whilst supporting our green initiatives.
Who will benefit from the proposal?
All employees where agile working is appropriate to the role.
Do the proposals affect service users, employees, or the wider community?   *Add any data you have on the groups affected split by Protected characteristic in the boxes below. Highlight how you have used the data to reduce any noted inequalities going forward*
The adoption of agile working should benefit employees to have more of a voice in determining where and when they wish to work following discussion with line management. Service users should not be directly impact as those in face-to-face clinical roles, in which it is not suitable to undertake duties remotely will not have agile working agreed.   **Adopting remote technology may benefit service users as they will not have to attend Trust sites for all appointments i.e., Telephone consultations with clinicians for example.**
Do the proposals significantly affect service delivery, business processes or policy?   *How will these reduce inequality?*
The adoption of agile working may improve work life balance for those living with disabilities as they will be able to reduce travel time and time spent in traditional work environments.   **Work may be impacted as employees will be more flexible with working hours and as such core hours of availability need to be agreed with line manager to ensure service users are not left without contact with relevant individuals.**

Does it involve a significant commitment of resources? *How will these reduce inequality?*
The Trust will need to identify areas for hot desking, booking systems and reasonable support for technology to make agile working a suitable alternative to office-based working.

Do the proposals relate to an area where there are known inequalities? (e.g., seclusion, accessibility, recruitment & progression)
Recruitment and accessibility   By adopting agile working candidates outside of Birmingham and Solihull may be encouraged to apply to work with the Trust, helping us recruit top talent from all protected characteristics.   Accessibility will be needs assessed to ensure any agile working sites are accessible to those with disabilities and neurodiversity needs. A combination of home working and site working will enable those with disabilities to work around treatment or accessibility issues, as long as it is appropriate and not encouraging employees who are unwell to remain working.

Impacts on different Personal Protected Characteristics – *Helpful Questions:*	
Does this proposal promote equality of opportunity? *Eliminate discrimination?* *Eliminate harassment?* *Eliminate victimisation?*	*Promote good community relations?* *Promote positive attitudes towards disabled people?* *Consider more favourable treatment of disabled people?* *Promote involvement and consultation?* *Protect and promote human rights?*

Please click in the relevant impact box and include relevant data				
Personal Protected Characteristic	**No/Minimum Impact**	**Negative Impact**	**Positive Impact**	**Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.**
Age			x	Agile working will support our workforce to achieve a better work life balance especially supporting those in caring positions for families and friends irrespective of age. The employees are reasonably evenly spread between 26-40 ages range 10.56% to 12.48% and ages 41 to 60 groups ranging from 13.13% to 14.38%. Therefore, there is a reasonable balanced profile with no one age group negatively impacted. However, the Trust recognises that home

				working arrangements will not be suitable for every service, role, or employee.
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your proposal? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				
Disability			x	The option of Agile Working will provide an increased flexibility and may offer opportunities for individuals with disabilities and neurodiversity conditions to work from home which may better suit their personal needs, thereby enabling continued working. Analysis of employees data shows that there is a small proportion of employees in the Trust who have indicated that they have a disability 5.38% there is however a higher percentage who have chosen not to specify – 10.23%. In opening the opportunity to consider homeworking the Trust recognises that home working arrangements will not be suitable for every service, role, or employee, such as clinical ward-based work. A balance between home working and accessible NHS sites will allow those living with disabilities the opportunity to reduce time spent commuting between sites, and in a manner that supports their ongoing wellbeing is maintained. For those living with disabilities and neurodiversity conditions social isolation can be a particular factor. Some disabled agile workers are more likely to feel isolated at the loss of social interaction and this may lead to stress and depression and ultimately a reduction in their quality of life. It is noted that we will need to ensure Display Screen Equipment assessments (Appendix 3) are undertaken for work sites and home working environments. Access to work and Occupational Health can support in assessments and identifying equipment that can be procured to assist employees and workers reaching a balance to promote wellness when at work. Cultural change is required to discourage presentism when individuals may be unfit to attend work. This is to be achieved through

				communications when agile working is and isn't suitable and via support to managers from the People Team.
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the employees, service users, carers, and families?				
Gender	x			Agile working will be available to all employees regardless of the gender they identify as. It is recognised that the Trust profile has a higher percentage of female employees at 73.06% compared to 26.94% male. In opening the opportunity to consider agile working, the Trust recognises that a combination of site and home working arrangements will not be suitable for every service, role, or employee. This may result in more female employees undertaking front line roles which they may not be able to be undertake from home due the nature of the work The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified.
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex? Is it easier for either men or women to access your proposal?				
Marriage or Civil Partnerships	x			Agile working should have no impact based on marriage and civil partnerships. Anyone can make a make request to work from home via the Trust's Flexible Working Policy. The aim of the guidance to provide managers and employees understand the process for agreeing and establishing agile working arrangements, and employees understand how to set up a safe and secure agile working environment.

				The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified.
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters				
Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity			x	Agile working should support expectant parent to work around any pregnancy symptoms or in pandemics to safeguard them and their expected baby. For parents/carers/guardians of premature or unwell children support to attend work around their caring duties. Agile working will support parents and childbirth partner to be present as agreed on KIT days or when they are required to care for the birth parent or child following delivery. Options of Agile working will form part of the Pregnancy/Maternity risk assessment. The aim of the guidance is to provide managers and employees to understand the process for agreeing and establishing agile working arrangements, and employees understand how to set up a safe and secure agile working environment.
This includes women having a baby and women just after they have had a baby				
Does your service accommodate the needs of expectant and post-natal mothers both as employees and service users?				
Can your service treat employees and patients with dignity and respect relation into pregnancy and maternity?				
Race or Ethnicity	x			Agile working should have no impact based on race and ethnicity as it will be open to employees from all work groups (except when it does not meet clinical needs of service users). The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified. Trust profile shows 37% BME, 50.6% white and 7.8% left blank and 4.7% did not state. The aim of the policy and homeworking guidance is to provide managers and employees an understanding of the process for agreeing and establishing how to set up a safe and secure agile working

					environment. Trust recognises that Agile working arrangements will not be suitable for every service, role, or employee.
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does employees have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?					
Religion or Belief	x				Agile working should have no impact based on religion or belief as it will be open to employees from all work groups (except when it does not meet clinical needs of service users). Trust profile 40.46% Christian; 19.18% do not wish to disclose; 10.97% Atheism; 8.64% are unspecified and 7.76% Islam and 'Other'; 2.91% Sikhism;1.70% Hinduism. Anyone can make a make request to work from home via the Trust's Flexible Working Policy. The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified.
Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area? When organising events – Do you take necessary steps to make sure that spiritual requirements are met?					
Sexual Orientation	x				Agile working will be available to all employees regardless of the sexual orientation they identify with. Trust profile 71.60% Heterosexual/straight; 16.11% did not state but declined to respond; 8.67% unspecified; 2.02% Gay or Lesbian and 1.42% Bisexual. The aim of the policy is to provide another option to employees/workers in conjunction with the Trust's Flexible Working Policy. The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified.
Including gay men, lesbians, and bisexual people Does your service use visual images that could be people from any background or are the images mainly heterosexual couples? Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?					

Transgender or Gender Reassignment	x			Agile working will be available to all employees regardless of the gender they identify as. The People Team will monitor any cases raised under the grievance policy to identify if any discrimination is occurring when applying agile working and take action to rectify if any issues are identified.

This will include people who are in the process of or in a care pathway changing from one gender to another
Have you considered the possible needs of transgender staff and service users in the development of your proposal or service?

Human Rights	x			Application of the Agile Working Policy will be monitored to make sure we are honouring people's right to a family life, and in line with UK employment law such as Working Time Directive Compliance.

Affecting someone's right to Life, Dignity and Respect?
Caring for other people or protecting them from danger?
The detention of an individual inadvertently or placing someone in a humiliating situation or position?

If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e., Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)

	Yes	No x		
What do you consider the level of negative impact to be?	**High Impact**	**Medium Impact**	**Low Impact**	**No Impact**
			x	

If the impact could be discriminatory in law, please contact the **Equality and Diversity Lead** immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.

If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the **Equality and Diversity Lead** before proceeding.
If the proposal does not have a negative impact or the impact is considered low, reasonable, or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the **Equality and Diversity Lead.**

Action Planning:
How could you minimise or remove any negative impact identified even if this is of low significance?
Employees will have the option to access hot desking facilities and rooms for team working, or if preferable to work from alternative NHS locations or home (as long as it complies with confidentiality and Trust policy). The People Team will monitor any grievances raised in line with Agile Working and make attempts to resolve at the earliest stage possible with the employee and manager. Support will be available for DSE, and Risk assessments as outlined in the Homeworking Guidance which supports the Agile Working Guidance. The Trust will also support referrals to Occupational Health or Access to Work if there are concerns about accessibility or adjustments required to support adoption of this policy for individuals on a case-by-case basis.
How will any impact or planned actions be monitored and reviewed?
Agile working will be recorded using appendix 2 and placed on employee's file. Any complaints regarding this policy will be monitored by the People Team and themes reported to the People Committee on request.
How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact other people as a result of their personal protected characteristic.
Agile Working will be actively promoted and in areas where it is not possible clear guidance will be issued stating the reason it would not be reasonable to adopt.
Please save and keep one copy and then send a copy with a copy of the proposal to the Senior Equality and Diversity Lead at bsmhft.edi.queries@nhs.net. The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis

Appendix 2: AGILE WORKING FORM

Name of Employee:	
Job Title:	
Department/ Team:	
Line Manager:	

The completion of this form confirms that the above-named employee, together with their line manager, has properly considered all issues relevant to agile working as detailed within the Agile Working Policy. A copy of this form is to be retained on the employee's personal file. The employee must also complete Appendix 3.

Agile working agreed	Home working/ hot-desking [confirm all that apply]
Nominal base:	
Contracted working hours:	
Core service hours to be covered:	[Specify here core service hours/ scope of working hours to identify flexibilities]
Equipment required:	Laptop/ tablet/ notebook/ smartphone/ smartcard/ 3G/4G card/ equipment bag/ keyboard/ smartcard reader/ laptop stand [Delete as applicable or add as appropriate]

	Comments	**Agreed Y/N**
Has the employee read and understood the Agile Working Policy, the principles underpinning Agile Working and completed the health and safety risk assessment set out in appendix 3 (any queries should be discussed with the line manager)?	Reinforce expectation that agile working requires a change in way of working. Where appropriate it can support more efficient and effective travel, use of base points/ hot desk areas, completing documentation during patient appointments and engaging patients in this process (unless rationale about why this was not appropriate).	
Is the employee compliant with mandatory Information Governance [IG] training requirements?	If not, agree completion date to ensure compliance.	
Is the employee trained to use all allocated agile equipment efficiently?		

	Comments	Agreed Y/N
Does the employee have a health condition which requires additional specialist equipment?	Examples include: Back care issues and need for specialist chair.	
How will performance be measured, and outcomes monitored?	Examples include: - Activity levels - Data quality - Record keeping entry timeframes - Service KPI's - Caseload size	
How will communication between line manager and employee be maintained?	Examples include: - Monthly supervision - Weekly scheduled meeting/ discussion - Ad hoc contact - Team meetings - Use of Teams / Video Calling Technology	
What are the mechanisms in place for informal support from the wider team?	Examples include: - Team meetings - Use of Teams / Video / Teleconferencing - Shared contact numbers for advice and consultation	
How will the employee's safety be monitored when working agilely?	Examples: - Electronic diaries to be kept up to date and as accurate as possible enabling most recent location to be checked by the team	
Is the employee aware that working from home is not a right and can be revoked at any time?		
Employee understands that there will be occasions when they are required to come into the office on planned working from home days to ensure business needs are met or to attend meetings?		
Does the employee understand their requirements to notify their manager when they are unable to work or be absent from work due to sickness or any other reason?	Confirm sickness reporting arrangements and direct to Trust Sickness Absence policy	
Has all necessary mandatory training been completed?	If not agree a date of when completion is required	

I wish to agile work and agree to abide by the terms of this agreement.

Signed: [employee]	
Date:	

To be completed by Line Manager:

Agile working request approved:

Signed: [Line Manager]	
Date:	

Agile working agreements will be review periodically by the line manager.

If agile working has not been approved, please list the reason(s) below:

There are no formal grounds for appeal where agile working has not been approved.

Appendix 3

Self-Assessment Checklist

In addition to Appendix 2 any employee working from home or away from their normal office location must complete this self-assessment checklist when working from home.

Any issues arising from the information given should be resolved with your Line Manager. Completed forms should be saved on the employee's personal file.

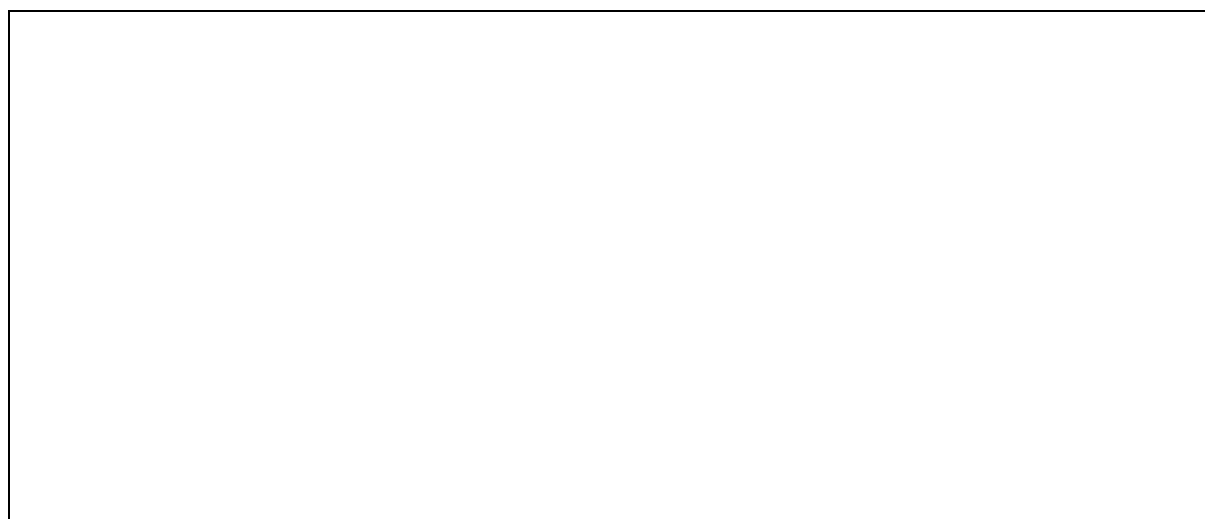|	
Employee Name:	
Date of Completion:	
Department/Team:	
Line Manager:	
Address working at (Home or site)	
Date of review (A minimum of annual review is expected)	

IMPORTANT:

If there are any changes in your health or you make any adjustments to your working conditions i.e., Relocate to another room or move furniture around, you should inform your Line Manager as a new self-assessment may need to be undertaken.

New expectant mothers – please notify your Line Manager as soon as possible of your pregnancy, as a risk assessment will need to be undertaken by your Line Manager

Work Area Layout

Please provide a simple line drawing of your workstation area (this does not need to be to scale), detailing location of desk / table within the room and general layout of room and if possible, photographs/screenshots can also be provided.

Working environment of area where agile working takes place		
	Yes	**No**
Is there sufficient ventilation, can windows be opened without risk to you?		
Is there sufficient lighting for the task?		
Is there sufficient heating? Are heating systems/ portable heaters maintained in good working order? *(Gas appliances must be maintained by a Gas Safe (previously CORGI) qualified engineer)*		
If portable heaters are used are these positioned to prevent toppling and away from combustible materials?		
Is there sufficient space for all the furniture & equipment used? (There should be at least 3.7 sq. Metres)		
Is flooring in good condition and free from trip hazards?		
Is there sufficient safe & secure storage space for equipment and documents used?		
Electrical safety		
Is the fixed electrical system in good condition e.g. No signs of scorching or arcing on sockets?		
Are there sufficient numbers of sockets to prevent overloading?		
If extension leads are used are this the fused and switched type? *(Cables and extension lead should be positioned so that they are not subject to excessive wear or damage and do not present a trip hazard)*		
Is electrical equipment used for agile working in good condition and free from any visual faults?		
Do you undertake visual checks of electrical equipment to identify any obvious faults such as worn or damaged leads or plugs?		
Safe Posture		
Does the chair used provide sufficient lumbar support?		
Can the chair be adjusted so that you can sit with your shoulders in a relaxed position and your elbows at a 90-degree angle, with the upper arms vertical and forearms horizontal whilst keying and using the mouse?		
Is the work surface of a sufficient size to accommodate all the equipment to be used?		

Is the sufficient space in front of the keyboard for you to rest your hands in between keying?		
Is there sufficient space below the work surface for your legs to enable you to stretch and change position?		
Can your feet rest on the floor or do you need a footrest?		
If you use a laptop, do you require a docking station?		
Are you likely to regularly use the telephone whilst using the keyboard or mouse? *(If yes, consider whether a headset is required).*		
Are you aware of the importance of taking regular breaks from computer-based work before fatigue sets in?		
Have you experienced any pain or discomfort when using the computer at home?		
Visual fatigue		
Is the screen positioned at the correct height and viewing distance? *(Your line eye-line should be just below the top of the screen and the screen should be positioned directly in front of you at approximately an arm's length away).*		
Is the screen free from glare or reflections? *(Ideally the screen should be at right angle to windows, windows should be provided by blinds or curtains to prevent glare from falling onto the screen.)*		
Is the screen free from flicker & are images clear & stable? *(IT can advise how to adjust the settings to suit the needs of the user)*		
Have you had a recent eye-sight test?		
Have you suffered from headaches or visual discomfort when working at the computer at home?		
Stress		
Is there sufficient segregation from disruptions e.g., Children, pets, other family members?		
Are there arrangements for keeping in contact with the Line Manager?		
Are there arrangements in place to conduct regular supervision/ personal development reviews with your Line Manager?		
Is support / advice readily available to you to deal with either IT problems or other specific work queries?		

Do you have access to sufficient training, information & instruction to enable you to undertake your work safely?		
Are there regular team meeting set up to support contact with team colleagues?		
Emergency arrangements		
Does the accommodation used for agile working have a smoke alarm?		
Have you identified what you will do in the event of a fire, either working from a Trust site or working from home? *(You should plan your escape route and what you would do if the route was unavailable do to fire/smoke, e.g.)*		

Action taken by you to address any issues

Action taken by Line Manager to address any issues

Signature of Employee:	Date:
Name of Manager:	Date for review of assessment:

Appendix 4: Equipment Log completed by employee to support Agile working.

Your name		Role	
Team		Email address	
Work mobile		Line manager name	
Work base			

Details of equipment you would like to borrow for home use from the Trust:

Monitor including cable ☐

Wireless keyboard (no smartcard) & mouse ☐

Keyboard (with smartcard) & mouse including connector ☐

Headset ☐

Smartcard reader ☐

Ergonomic workstation chair ☐

Desk ☐

Backrest ☐

Footstool ☐

Document holder ☐

Line manager approval

I have agreed agile/ homeworking arrangements and equipment requirements with my line manager ☐

DSE Assessment

I will undertake a Display Screen Equipment assessment (DSE) of my home workstation and use of the equipment in my home (as per appendix 3) and will share details of the outcome with my line manager. ☐

I have read and will follow Trust policies in particular the advice on Display Screen Equipment and Electrical safety. ☐

I understand that I must take reasonable care of the equipment borrowed from the Trust to prevent it from loss or damage; that I must raise any health and safety concerns with my line manager straightaway; that I must comply with the relevant Trust policies; and that I am responsible for the prompt return of the equipment if my primary work site changes to on-site or if requested to do so.

Electronic signature:
OR
I am sending this form from my NHS email address in lieu of my signature   ☐

Date:

Equipment log form returned to your line manager
Completed forms to be saved on the employee's personal file