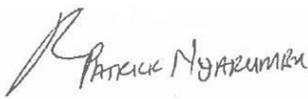




# Special and Carers Leave Policy

<b>Policy number and category</b>	HR04	Human Resources
<b>Version number and date</b>	7	February 2026
<b>Ratifying committee or executive director</b>	Transforming our Culture and Staff Experience Sub Committee	
<b>Date ratified</b>	February 2026	
<b>Next anticipated review</b>	February 2029	
<b>Executive director</b>	Executive Director of Strategy, People and Partnerships	
<b>Policy lead</b>	People Partner – Service Delivery	
<b>Policy author (if different from above)</b>		
<b>Exec Sign off Signature (electronic)</b>		
<b>Disclosable under Freedom of Information Act 2000</b>	Yes	

## Policy Context

This policy aims to inform managers and employees of the different types of “special leave” which may be used in a variety of circumstances and the scope in where, when and how they can be implemented. It sets out clear procedures for requesting, authorising, and recording special leave, ensuring decisions are made fairly, compassionately, and in line with service needs.

This policy is developed in accordance with employment legislation, Agenda for Change terms and conditions, and the Trust’s desire to create a workplace where employees are supported in balancing their working lives with their commitments outside of work.

## Policy Requirement

This policy outlines potential circumstances in which the requesting and authorisation of special and carers leave is appropriate for employees of the Trust, subject to the needs of the service.

Alongside carers leave, other examples include bereavement leave, medical appointments, Armed Forces Reservists, and jury service. The list provided is intended to be illustrative and not exhaustive.

## Change Record

Date	Version	Author (Name and Role)	Reasons for review / Changes incorporated	Ratifying Committee
October 2025	7	David Barros Howe (People Partner)	<p>Updated the policy document to reflect best practice whilst reducing length of the document. Details that are more suited for knowledge-based articles, Standard Operating Procedures, and other educational resources will support implementation of the policy.</p> <p>The policy adheres to employment law and wider NHS best practice.</p> <p>The document now reduces duplication with elements that were previously in the Family Leave policy.</p>	TCSE
August 2018	6	Louise Manyame (HR Advisor) Maisee Reeves (HR Advisor)		Workforce committee

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# 1. Introduction

## 1.1. Rationale

Birmingham and Solihull Mental Health NHS Foundation Trust (BSMHFT) is committed to helping staff to achieve a healthy work-life balance and resolve personal difficulties, in order to maintain their wellbeing, and ensure effective performance and the continued provision of high-quality service.

BSMHFT understands that in exceptional circumstances, emergencies/duties which affect employees and/or their dependents may require them to be unavoidably absent from work.

BSMHFT takes seriously its responsibility to support any employee who has caring responsibilities for relatives or friends who may need special support because of age, disability or illness.

As a result, this policy aims to provide a clear framework for decision making to ensure a fair and equitable approach in the consideration of leave requests, balanced with the needs of the service.

BSMHFT Managers and employees can liaise with their divisional People Team representatives on the appropriate application of this policy.

## 1.2. Scope

The following areas are covered within the policy:

- Unexpected and serious domestic situations e.g. burst pipes, flooding or burglary
- Bereavement or compassionate leave
- Carer's leave
- Attending medical appointments
- Religious Festivals
- Civil or public duties
- Armed Forces Reservists
- Recruitment and selection interviews
- Inclement weather

This policy applies to all employees of BSMHFT, excluding those employed solely through Temporary Staffing Solutions, Agency staff and contractors.

### 1.3. Principles

We are committed to creating a positive workplace culture where everyone takes responsibility for their behaviour and contributes to a supportive environment. All BSMHFT people will treat each other fairly, consistently and resolve matters promptly.

Our people are guided by the people of our community which are:



## 2. Policy

This policy aims to inform managers and staff of the different types of “special leave” which may be used in a variety of circumstances.

BSMHFT employees will act in a fair and reasonable manner in both making requests for special leave and, if they are in a role which has managerial responsibilities, in considering and approving applications for special leave with a responsive, compassionate and flexible approach which is consistent with the Trust’s policy. Individual decisions about the granting of special leave cannot be considered as precedents.

In exceptional cases and where circumstances dictate, leave over and above the periods described in this policy may be granted by a Senior Manager, usually an Associate Director or Clinical Director. Advice should always be sought from the People Operations Team prior to this being agreed.

### **3. Procedure**

#### **3.1. Requesting Special Leave**

All requests for special leave i.e., any absence other than authorised leave or sickness must be submitted in writing to the line manager using the “Application for Special / Carer leave” form, and approved by way of signature by the employee’s line manager. The most up to date templates associated with Special and Carers Leave can be accessed via the [CONNECT Resource Hub \(https://nhs.sharepoint.com/sites/RXT\\_PeopleandCulture\)](https://nhs.sharepoint.com/sites/RXT_PeopleandCulture).

The request for special leave is open to all employees irrespective of length of service.

When deciding whether to approve special leave, managers should consider:

- The urgency of the problem
- The nature of the domestic issue
- The impact on the employee
- The effect on service delivery; and/or
- The distance the employee needs to travel
- If applicable, the manager should reference the Family Leave policy.

If the leave is refused, the reason for the refusal will be discussed with the employee and clearly stated on the leave form. Due to the nature of this request, it is envisaged that this request will be dealt with retrospectively.

If the leave is agreed, it is important to discuss the duration of the absence and the anticipated return to work date. There should also be a discussion prior to the special leave of the arrangements for maintaining contact during the staff member’s absence.

#### **3.2. Notice Required for Leave**

In making a request, employees should always act responsibly by giving as much notice as possible if circumstances permit, to allow time for consideration and any cover arrangements that may be required. In times of an unexpected urgent crisis, employees should notify their manager at the earliest convenience. Where examples are given within the actual policy, please note that these are not exhaustive lists.

#### **3.3. Unauthorised Special Leave**

Employees may only take special leave when they have been given prior permission to do so. Leave that has not been agreed in advance could potentially be treated as unauthorised absence. BSMHFT reserves the right to request documentary evidence to consider an application for special leave, e.g. medical appointments.

### **3.4. Recording Special Leave**

Managers should enter and maintain records on ESR of all leave requests, including the reason, the dates of leave, the length of leave, and whether the leave is paid or unpaid.

All absences should be recorded on ESR via the manager's self-service. It is important to record this leave as soon as is practicable on the employee's return, preferably when they return on their first day / shift. The form should be retained on the individual's personnel file.

Any requests for leave not covered specifically by this policy should be discussed with the People Operations Team.

It will be for managers to ensure that situations which are recurring or on-going are dealt with by alternative strategies, such as adjustments (temporary or permanent) to hours, periods of unpaid leave, annual leave, or an extension of special leave.

### **3.5. Special Leave for Unexpected and Serious Domestic Situations**

Paid special leave will be granted to enable an employee to manage unexpected, serious domestic emergencies, such as childcare requirements, a dependent has a serious accident, flooding of the home, or situations that poses a risk to the employee's property.

- Up to 1 day of paid special leave will be granted to enable the employee to manage the situation.
- Annual leave or unpaid special leave may be granted when this paid special leave is exhausted.
- Following their return from absence, the employee will meet with their line manager to confirm the leave type(s) for the full period of absence.

Further details of the discussion, including the reasons for requesting this leave should be recorded on the application for special/carers leave form. A discussion around the employee's wellbeing and potential requirement of further support should also be held.

The use of special leave will be monitored and regularly reviewed by the manager, with consideration of the number of applications submitted and any evidence of potential abuse of this policy.

### **3.6. Special Leave for Medical Appointments**

The majority of routine dental appointments or GP appointments should be arranged outside of working hours. Where possible, employees should request the appointment that gives the least disruption to service provision i.e. as close as possible to the beginning or end of their working day.

A reasonable amount of paid special leave may be granted where an employee is required to attend a medical appointment at the discretion of their line manager.

The employee will be expected to produce an appointment letter or card and complete their shift prior to and after any such appointment, as long as it is reasonably practicable to do so. Where the request for time off impacts on service provision the employee may be asked to make up time lost, use annual leave or take unpaid leave. Employees should make the request in advance and give as much notice to their manager as possible.

Occupational Health appointments requested by the Trust will be paid and not recorded as special leave.

For IVF and ante-natal and postnatal appointments please refer to the provisions within the Family Leave Policy.

### **3.7. Employees with a disability or long-term health condition**

For people with a disability or long-term condition, which is registered on ESR, and who have developed an agreed health ability passport with the Trust, extra provision for medical conditions is equitably provided.

In cases of disability related medical appointments, BSMHFT supports paid time away from work for treatment, rehabilitation and assessment of a disability or underlying health condition. Each case will be considered on an individual basis for how much leave is reasonable pro rata per annum but allows for the planning for up to an additional two working weeks (pro rata – in hours) being deemed as reasonable. The level of extra leave available each year needs to be agreed in advance. Employees should additionally strive to arrange appointments in a way that limits the impact on operational hours and be prepared to share appointment details on request.

### **3.8. Carer's Leave**

BSMHFT recognises that employees may have a dependant with long-term care needs, and in such cases, from day one of employment the employee is entitled to a week of unpaid special leave every 12 months. This can be used to provide care or arrange care for the dependant.

Carer's leave is not to be confused with Special Leave for Unexpected and Serious Domestic Situations.

For consideration of this leave, the dependant does not have to be a family member, but must rely on the employee for their care, and have one or more of the following:

- A disability
- Care needs due to old age
- A physical or mental injury that means they're expected to need care for more than three months

When applying for this leave, the employee should submit a request as early as possible, or at least 3 days' notice.

Please liaise with the People Operations Team by emailing [bsmhft.hrsupport@nhs.net](mailto:bsmhft.hrsupport@nhs.net) should further guidance on application of this leave be required.

### **3.9. Parental Bereavement leave**

Parents who lose a child, or who suffer a stillbirth from 24 weeks of pregnancy will be entitled to 2 weeks bereavement leave irrespective of how long they have worked for the Trust. For this agreement, there is no requirement for the child to be under 18 years of age.

Parents in this circumstance are defined as:

- Anyone who was responsible as a primary carer of a child who is now deceased.
- Adoptive parents and legal guardians, such as grandparents who are the primary carers of a child.
- Individuals who are fostering to adopt.

- Any other parent/child relationship that BSMHFT deems to be reasonable (for example, instances where someone other than the biological parent is the primary carer – this could be the case where the parents of the child have separated).

The bereaved parents can request to take this leave at any time up to 56 weeks following the death of a child, and this does not have to be taken consecutively.

- The request must be made to their line manager, with reasonable notice of their intention to take the leave.
- A compassionate approach should be taken by the manager, and if the parent requires more time off, then this period can be extended using annual leave, unpaid special leave or flexible working arrangements if appropriate. The manager can liaise with the People Operations Team for guidance.

Bereaved parents may wish to explore the range of resources, services and external organisations to support them during this difficult time. The most up to date resources associated with Special and Carers Leave can be accessed via the [CONNECT Resource Hub \(https://nhs.sharepoint.com/sites/RXT\\_PeopleandCulture\)](https://nhs.sharepoint.com/sites/RXT_PeopleandCulture).

### 3.10. Baby loss or miscarriage

Refer to the Family Leave Policy for full details on baby loss or miscarriage occurrences.

### 3.11. Bereavement or Compassionate Leave

Bereavement leave will be granted following the death of a close relative, family member, partner (regardless of their gender), or close friend.

**Up to 5** working days (or equivalent) paid leave may be granted. This need not be taken consecutively, and individual circumstances need to be considered. Additionally, **a further day's paid leave** would normally be granted for the day of the funeral and will be in addition to the provision made for bereavement.

Annual leave or unpaid leave may be granted when bereavement leave is exhausted or is not appropriate and where additional time may be required.

- Factors to be considered in reaching a decision should include:
- Personal relationship with the deceased
- Responsibility for funeral arrangements and/or personal effects
- Amount of travelling involved

BSMHFT naturally recognises that bereavement will be a particularly difficult time in the employee's life. Managers should ensure that any employee going through such an experience is shown compassion and made aware of the services of Staff Support, or relevant external services.

Bereaved colleagues may wish to explore the range of resources, services and external organisations to support them during this difficult time. The most up to date resources associated with Special and Carers Leave can be accessed via the [CONNECT Resource Hub \(https://nhs.sharepoint.com/sites/RXT\\_PeopleandCulture\)](https://nhs.sharepoint.com/sites/RXT_PeopleandCulture).

### 3.12. Religious Festivals

All employees who need time off for religious or cultural observance will be entitled to request the following, subject to the needs of the service:

- General flexibility in arrangement of working hours, and/or
- Annual leave, or unpaid leave.

All managers should be considerate to requests and should accommodate them wherever it is reasonably practicable to do so.

### **3.13. Special Leave for Civic or Public Duties**

BSMHFT acknowledges the value of civic and public duties. Up to 3 days paid special leave every 12 months can be granted, which can be supplemented with annual leave or unpaid special leave. To find details as to what falls under this category, view via the [CONNECT Resource Hub \(https://nhs.sharepoint.com/sites/RXT\\_PeopleandCulture\)](https://nhs.sharepoint.com/sites/RXT_PeopleandCulture).

### **3.14. Magistrate**

The trust supports employees who require reasonable time off work to carry out their duties. An employee will have up to 13 days paid special leave (or 26 half-days per year). Due to the processes involved, Magistrates receive their rota in advance. Therefore, it is expected that leave requests are put through to the line manager in a timely manner.

### **3.15. Jury Service**

Jury Service is a public duty and paid special leave must be granted to the employee. In approving the leave, the employee must provide a copy of the jury summons to their line manager.

There is a degree of discretion where it may be possible to defer Jury Service, these include if the employee delivers a service that is critical for continuation of an NHS service, those over 65, and anyone who has served on a jury within the last two years.

### **3.16. Attendance at Court or Tribunal as a Witness**

Paid special leave will be granted to employees if BSMHFT is supporting the individual to attend a hearing for example, at Coroner's Court.

Paid special leave may also be granted:

- To attend court as a witness on behalf of the Trust
- To attend an Employment Tribunal as a witness on behalf of the Trust
- To attend court as the accused / claimant / defendant
- For Family law cases

This also applies to medical staff with the exception of them attending court as a medical witness. These provisions are set out in their respective terms and conditions.

### **3.17. Armed Forces Reservists**

A total of 7 paid special leave days shall be granted to Reservists to enable them to attend their annual training. This may be supplemented by either paid annual leave or unpaid special leave up to a maximum leave of absence of 16 continuous working days.

Reservists may be mobilised for service on a voluntary or compulsory basis. The line manager must provide consent before a Reservist can be released from their employment for service. Where operationally feasible, BSMHFT will release employees from duty, who are either voluntary reservists for 'call-out' or on active service or ex-regular forces members for recall to service.

### **3.18. Leave for Attendance at interview Panels**

Paid leave will be granted for an employee to attend for recruitment and selection interviews and or tests within the NHS. The amount of leave given will consider travel time.

Once the interview is over, the employee will return to their base and complete their shift/working day. It is at the manager's discretion as to whether additional paid time off is given for interview preparation.

If an employee requests time off to attend a recruitment interview with an external employer they should use annual leave, take time off in lieu or take unpaid leave.

It is not appropriate to use paid special leave in such circumstances. However, paid leave will be given when an employee is attending interviews as part of the redeployment process under the Organisational Change Policy.

### **3.19. Severe Weather or Transport Difficulties**

The following section applies where employees face difficulties in travelling to and from work due to severe conditions including inclement weather e.g. heavy snow or major transport difficulties e.g. major disruption to public transport facilities.

It is accepted that during times of severe weather and/or disruption to the public transport service it may be difficult to report to duty at the required commencement time. Line managers will authorise full payment of employees who report for duty late, if they can show that they have made every effort to arrive for work on time taking into account the weather conditions/availability of transport services and any other relevant factors.

Where managers are satisfied that all essential work has been completed and adequate cover provided, they have discretion to allow employees to leave work early and to authorise payment up to the normal finishing time.

Where employees are unable to attend for work in these conditions, they should follow normal procedures for reporting their absence and inform line managers of their absence by telephone as soon as practicably possible.

Employees in this position may be given the option to use annual leave, lieu days or alternatively unpaid leave. Employees who fail to notify their manager of their absence will not be paid and the relevant absence period will be classified as unauthorised.

Where employees are unable to attend their normal work base due to severe conditions, following liaison with the relevant manager they may, where appropriate, be requested to work at another location within the Trust if accessible.

Should the disruption caused by severe weather/failure of public transport facilities continue for lengthy periods, consideration will be given to the provision of special transport or other suitable alternative arrangements. These will normally be made by the appropriate Associate / Clinical/ Corporate Director after the identification of essential employees i.e. Employees whose absence would seriously affect the level or safety of service provided.

### **3.20. Short-term Unpaid Leave**

There may be circumstances in which a member of staff requests to take a period of unpaid leave for a purpose other than those outlined above and for less than 3 months. Where possible, unpaid leave requests should be submitted in advance, giving sufficient notice.

If the period of leave requested is greater than 3 months, the employee should apply for time off using the Employment Break Policy.

The employee must complete the unpaid Leave form which will be considered and where feasible approved by their Manager. All granted unpaid leave should be recorded by the manager on ESR via manager's self-service.

In deciding, the manager should have a discussion with the employee considering their outstanding annual leave entitlement and also consider service needs. If authorised, the leave should be made up of a combination of annual leave and unpaid leave to ensure that the employee is not left with a disproportionate amount of annual leave at the end of the leave year.

NHS pension contributions will be affected during long periods of unpaid leave and employees are advised to contact SBS Pensions Department to confirm how their pension will be affected and the options available to them for mitigating this.

## 4. Responsibilities

Post(s)	Responsibilities
All employees	<p>The responsibilities of employees in accordance with this policy are:</p> <ul style="list-style-type: none"> <li>• To request leave in accordance with the procedure and give managers as much reasonable notice as possible.</li> <li>• To keep managers fully informed of the length of leave requirements where these may be predicted.</li> <li>• To provide evidence or further information as requested to support an application, or retrospective application for special leave.</li> </ul>
Management Responsibilities	<p>The responsibilities of Managers in accordance with this policy are:</p> <ul style="list-style-type: none"> <li>• To authorise paid or unpaid leave fairly and consistently in accordance with the policy.</li> <li>• To ensure that records are kept for all periods and requests of special leave using the application form.</li> <li>• To ensure that employees are aware of the policy and their rights within it.</li> <li>• To respond to all requests in a supportive and compassionate manner.</li> <li>• To update ESR with approved special leave dates.</li> <li>• To ensure employees are signposted to support available, such as the Employee Assistance Programme.</li> </ul>
Associate Directors	<p>Ensure that managers within the defined service area of responsibility apply the policy and procedures fairly, consistently and in a timely manner.</p>
Executive Director	<p>To ensure any concerns regards the policy are considered as appropriate and it is reviewed in line with any legislative changes.</p>

## 5. Development and Consultation Process

Consultation summary		
Date policy issued for consultation	12/11/2026	
Number of versions produced for consultation	7	
Committees or meetings where this policy was formally discussed		
JOSC	01/10/2025	
PDMG	02/12/2025	
TCSE	05/02/2026	
Where else presented	Summary of feedback	Actions / Response

## 6. Reference Documents

The following internal documents are referenced by this policy and can be accessed via CONNECT ([https://nhs.sharepoint.com/sites/RXT\\_Connect](https://nhs.sharepoint.com/sites/RXT_Connect)):

- Employment Break Policy
- Family Leave Policy
- Health, Wellbeing and Attendance Policy
- Organisational Change Policy

## 7. Bibliography

The following resources were considered in the development of this policy:

- Agenda for Change (NHS terms and conditions of service)
- Employment Act 2002
- Employment Rights Act 1996
- Employment Relations Act 1999
- Work and Families Act 2006
- The Reserve Forces Act 1996

## 8. Glossary

Term	Definition
Bereavement/Compassionate Leave	Paid leave following the death of an immediate or close family member, friend or partner. Employees have a statutory right from day one of their employment to bereavement/compassionate leave.
Carer	Someone who is responsible for the care and wellbeing of another person (a friend or family member) suffering from a physical or mental health illness, addiction or a disability, who cannot care for themselves.
Dependent	Someone who is an employee's parent, wife, husband, partner, child, or is someone who relies on the employee in an emergency.
Special Leave	Paid or unpaid leave, in addition to annual leave and to help employees balance work and personal responsibilities during times of urgent and unforeseen need. This is not intended for long term domestic and family needs.

## 9. Audit and Assurance

The Trust will monitor requests for Special and Carers leave and the implementation of this policy and take necessary action to ensure the procedure is applied fairly and consistently. In instances where abuse of the policy is determined, relevant action will accordingly be taken in line with the appropriate Trust policies.

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Total number of Special and Carers leave applications submitted (monthly/annually)	Line management / People and Culture Team	ESR / HR Analytics	Monthly	Divisional FPPs and HR Clinics
Frequency of repeat ESR bookings by individual employees	Line management / People and Culture Team	ESR	Monthly	Divisional FPPs and HR Clinics
Leave uptake by staff group, role or pay band.	People and Culture Team	ESR / HR Analytics	Monthly	Divisional FPPs and HR Clinics
Analysis by protected	People and Culture Team	ESR / HR Analytics	Monthly	Divisional FPPs and HR Clinics

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
characteristics (anonymised; gender, age, disability, ethnicity)				
Number of appeals or grievances related to special/carers leave decisions	People and Culture Team	HR Casework Records	Annually	TCSE

## Appendix 1: Equality Impact Assessment

Title of Policy	Special and Carers Leave		
Person Completing this policy	David Barros Howe	Role or title	People Partner
Division	Strategy, People and Partnerships	Service Area	People and Culture
Date Started	October 2025	Date completed	
Main purpose and aims of the policy and how it fits in with the wider strategic aims and objectives of the organisation.			
<p>This policy aims to inform managers and staff of the different types of “special leave” which may be used in a variety of circumstances. This policy is developed in accordance with legislation, Agenda for Change/Medical terms and conditions and BSMHFT’s desire to create a workplace where employees are supported in balancing their working lives with their commitments outside of work.</p> <p>As a result, this policy aims to provide a clear framework for decision making to ensure fair and equitable approach in the consideration of leave requests balanced with the needs of the service.</p>			
Who will benefit from the policy?			
BSMHFT is committed to helping all staff, balance the demands of both their work and personal needs and recognises the importance of supporting staff to achieve a work-life balance, in order to maintain an effective performance and the continued provision of high-quality service.			
<p>Does the policy affect service users, employees or the wider community?</p> <p><i>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</i></p>			
This policy is to ensure there are guidelines and mechanisms in place that support Special and Carers leave requests. This results in consistency in approach across the organisation and that the workforce are supported when urgent, domestic, and / or unpredictable situations occur. Therefore, this policy applies to all employees.			
<p>Does the policy significantly affect service delivery, business processes or policy?</p> <p><i>How will these reduce inequality?</i></p>			
No. It does not have an impact on service delivery.			

Does it involve a significant commitment of resources? <i>How will these reduce inequality?</i>				
No				
Does the policy relate to an area where there are known inequalities? (e.g. seclusion, accessibility, recruitment and progression)				
No				
Impacts on different Personal Protected Characteristics – <i>Helpful Questions:</i>				
Does this policy promote equality of opportunity? <i>Eliminate discrimination?</i> <i>Eliminate harassment?</i> <i>Eliminate victimisation?</i>			<i>Promote good community relations?</i> <i>Promote positive attitudes towards disabled people?</i> <i>Consider more favourable treatment of disabled people?</i> <i>Promote involvement and consultation?</i> <i>Protect and promote human rights?</i>	
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			This policy outlines what leave entitlement employees can be assigned should they need to care for elderly parents, family members, or children in urgent or unpredictable situations. This policy ensures that all employees should be treated in a fair, reasonable and consistent manner. Employees may be required to step into a caring role for longer due to an aging population and taking on more caring responsibilities for family or other dependents. This is recognised though as the process for applying for special leave is not determined by their age.
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your policy? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				

Disability			X	Employees living with disabilities may be required to take more time off work to manage health conditions or attend medical appointments. The policy allows for flexibility and demonstrates support available. This policy ensures that all employees should be treated in a fair, reasonable and consistent manner.
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 staff, service users, carers and families?				
Gender			X	In majority of cases, it is found that caring responsibilities are found to predominately fall to female carers. The policy is equitable in terms of how it responds to requests, and it is not contingent on gender recognition. This policy ensures that all employees should be treated in a fair, reasonable and consistent manner.
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 policy?				
Marriage or Civil Partnerships	X			There is little evidence that staff are disproportionately affected as result of their marital status.
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			Support for those who are pregnant or on maternity is covered within the Family Leave Policy.
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 staff and service users? Can your service treat staff and patients with dignity and respect relation in to pregnancy and maternity?				
Race or Ethnicity		X		The policy does not currently recognise national days such as Jamaican Independence Day which could be celebrated by individuals in the same way that religious events are held. This is managed on a local basis but may be perceived as a negative impact. The reason the policy has not been adapted in light of this is due to the need to be clear on what can be recognised as special leave, and what can be managed through annual

				leave or management discretion.
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does staff 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			Provision is made for those who wish to request leave to mark religious events or to mark their beliefs, as such the policy does not disproportionately affect staff.
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			There is no evidence this policy can disproportionately affect employees as a result of their sexual orientation.
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			There is no evidence this policy can disproportionately affect employees as a result of their sexual orientation. Support and leave guidance for staff transitioning is included in the Health, Wellbeing and Attendance Policy.
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 policy or service?				
Human Rights	X			The policy aims to treat all employees equitably and in accordance with their Human Rights. Managers are encouraged and expected to implement this policy in a fair and consistent manner.
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)				

		No		
What do you consider the level of negative impact to be?	High Impact	Medium Impact	Low Impact	No Impact
				X
<p>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.</p> <p>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.</p> <p>If the policy 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.</p>				
Action Planning:				
How could you minimise or remove any negative impact identified even if this is of low significance?				
There is no negative impact from the introduction of this policy. It ensures practices are in place should a Special Leave request be submitted and outlines how a manager should respond.				
How will any impact or planned actions be monitored and reviewed?				
Feedback from reports of concerns, escalating concerns through governance routes. Communication to managers through Operational Meetings. Future staff survey results should also show an impact on the impact of this policy.				
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.				
Communications plan and trust wide promotion in ways accessible to ALL employees without the reliance upon electronic communications				
Please save and keep one copy and then send a copy with a copy of the policy to the Senior Equality and Diversity Lead at <a href="mailto:bsmhft.edi.queries@nhs.net">bsmhft.edi.queries@nhs.net</a> . 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				