**CONFIDENTIAL**

**Individually tailored reasonable adjustments and flexible working arrangements**

Managers who need help in deciding whether or not an adjustment for a staff member is reasonable may find it helpful to contact the Equality, Diversity and Inclusion (EDI) Team (Diversity@bath.ac.uk) or their HR Business Partner/Advisor (link).

This is a living record of the reasonable adjustments and flexible working arrangements (hereafter ‘adjustments’) agreed between an employee and their line manager.

The purpose of this agreement is to:

* Ensure that both parties, the individual and the manager, have an accurate record of what has been agreed.
* Minimise the need to re-negotiate adjustments every time the employee changes jobs, is re-located or assigned a new manager within the organisation.
* Provide employees and their line managers with the basis for discussion about adjustments at future meetings.

The agreement allows the employee to:

* Explain the impact of their impairment(s), health condition(s), caring or other personal commitments on them at work.
* Suggest adjustments that will make it easier for them to do their job and safeguard their wellbeing.
* Offer further information from their doctor, specialist or other expert.
* Request an assessment by Occupational Health, Access to Work or another expert.
* Seek input from HR, the Equality, Diversity and Inclusion (EDI) or the SHEW team.
* Review the effectiveness of the adjustments agreed.
* Explain any change in their circumstances or health.
* For staff with long term or progressive conditions, be reassured that their manager knows what to do if they become unwell at work.
* Know how and when their manager will keep in touch with them if they are absent from work because of illness, caring or an access-related reason.
* Be assured that their manager is committed to meeting their access and other needs in the workplace.

The agreement allows the line manager to:

* Understand how a particular employee’s circumstances affect them at work.
* Record the needs of the team, department or division to determine how best to meet everyone’s needs.
* Summarise the University’s Managing Attendance Policy (link) and Building Disability Confidence & supporting disabled staff guidance ([Building disability confidence & supporting disabled staff (bath.ac.uk)](https://www.bath.ac.uk/guides/building-disability-confidence-supporting-disabled-staff/))
* Recognise signs that an employee might be unwell, or experiencing a flare up of a progressive or long term condition, and know what the employee wants them to do in these circumstances.
* Know how and when to stay in touch if the employee is on sick or extended carers leave.
* Consider whether the employee needs to be supported with an application to Access to Work or referred for assessment by Occupational Health to help both parties understand what adjustments are needed.
* Review the effectiveness of any adjustments already agreed.
* Consider any change in the employee’s circumstances.

**This is a live document and should be reviewed at least once a year**. It should be revisited during the course of annual SDPRs and its contents taken into account (where relevant) should any other formal procedures be initiated, such as the Dignity & Respect Policy & Procedure, Disciplinary or Capability Policies. **Please note: this information will only be shared with the employee’s permission**. Remember, however, that expert advice from third parties, such as HR, Occupational Health, EDI specialists, Access to Work or IT specialists may be needed before changes can be agreed and implemented.

New managers of employees with this document should accept the adjustments outlined in the agreement as reasonable - unless they are demonstrably impractical - and ensure that they continue to be implemented. The agreement may need to be reviewed and amended at a later date but this should not happen until both parties have worked together for a reasonable period of time i.e. no less than 3 months, unless there are substantive material changes in the working environment e.g. an office move to a different location.

**Agreement of adjustments**

This is a record of the adjustments agreed between [*add* *employee’s name*] and [*add line manager name*]

This agreement may be reviewed and amended as necessary with the agreement of both parties and will in any event be refreshed during probation meetings and any subsequent annual meetings. In addition, this agreement may be reviewed:

* At any regular one-to-one meeting.
* At a return to work meeting following a period of sickness or caring-related absence.
* Before a change of job or duties or the introduction of new technology, location or ways of working.
* Before or after any change in circumstances.

**Section 1: Defining adjustments needed**

**Employee to complete in conjunction with line manager**

The reason I am requesting adjustments

|  |
| --- |
| Outline the reasons for requesting adjustments |
| The issues I experience at work due to my circumstances include: |

|  |
| --- |
| I need the following agreed adjustments (refer to Access to Work agreement or other agreed work life balance arrangements if relevant): |

**Section 2: Wellbeing at work**

**Employee to complete**

**\*This is optional for employees who have fluctuating mental or physical conditions only – if not applicable go to section 3**

|  |
| --- |
| On an ‘average day’ my impairment(s)/condition(s) has the following impact on me at work: |
| My condition fluctuates. This means that sometimes I experience the following difficulties: |
| The following signs indicate that I am not well enough to be at work: |
| In such circumstances please contact (please ignore if not applicable):  |

**Keeping in touch and returning from work following impairment-related sickness or extended caring-related absences.**

For further guidance see the University’s Managing Attendance policy (link).

**Section 3: Communicating adjustments to colleagues**

Line manager to complete in conjunction with employee

(To be adapted as necessary e.g. different subsections of staff groups)

I will share the following information about your adjustment(s) with immediate colleagues:

|  |
| --- |
| We have agreed that it is appropriate and relevant for us to share with your immediate colleagues the information recorded in this section of the form about the support you need at work. We will do this by: |

|  |
| --- |
| We have agreed that it is appropriate and relevant for us to share with staff outside the department the information recorded in this section of the form about the support you need at work. We will do this by: |

An up-to-date copy of this form will be retained by employee and the line manager and an up-to-date copy should be retained on iTrent.

A copy of this form may also be given to a new or prospective line manager with the prior consent of the employee.

**S**ection 4: Summary of actions and/or adjustments agreed, who by and when

|  |  |  |
| --- | --- | --- |
| **Adjustment agreed** | **Who** | **When** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

An employee’s line manager and the employee are each responsible for informing the other of any changes in circumstances relating to this agreement at the earliest opportunity.

Employee signature:

Print name:

Date:

Line manager signature:

Print name:

Date:

**Manager to complete below for monitoring purposes**:

|  |  |  |
| --- | --- | --- |
| **Tick any that apply** | **Type of support** | **Definition** |
|  | 1. Non-Disability related
 | Any atypical working arrangement to accommodate caring responsibilities. Such as flexible working and working from home which are not part of an agreed reasonable adjustment. |
|  | 1. Human Support
 | The provision of a support worker, sign language interpreter or job aid. \* |
|  | 1. Support with travel to work
 | A contribution towards the cost of using a taxi or minicab to replace all or part of a journey on public transport, when travelling to or from work and/or within working hours. \* |
|  | 1. Physical adaptations or space reallocation
 | Changes made to the physical features of a building and its surroundings or the reallocation of space within buildings. \* |
|  | 1. Additional equipment or furniture
 | The provision of specifically designed equipment, including adaptive technology and the acquisition of non-standard office furniture. \* |
|  | 1. Flexible working
 | Changing the start or finish times or agreeing to some remote working. (Either on a time-limited or open-ended basis) as a ‘reasonable adjustment’. |

The University confidentially and securely monitors the number of employees that have an agreement in place, in line with our duties under the Equality Act 2010. Where this agreement is in place please indicate one or more relevant categories these fall into.

\*Funded either through Access to Work or Departmental resources