



# Flex your Life at LUHFT

Your Flexible Working support offer



We work  
**flexibly**

*Welcome to:*

# Flexible Working Briefing Session

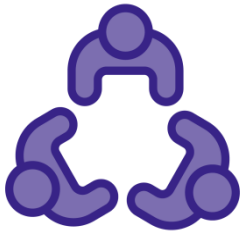
#**hello** my name is...

Clare Vickers, HR Business Partner  
Rebecca Heath, HR Manager  
Stuart Jones, Workforce Information Lead

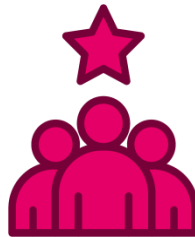
LIVING OUR VALUES



# Aims of the Session:



Understand  
the cultural  
shift of the  
Trust



Engagement  
with the  
policy and  
process



Leading  
with  
compassion



Open  
discussion and  
opportunity  
for questions



Active  
Learning



# Learning Objectives

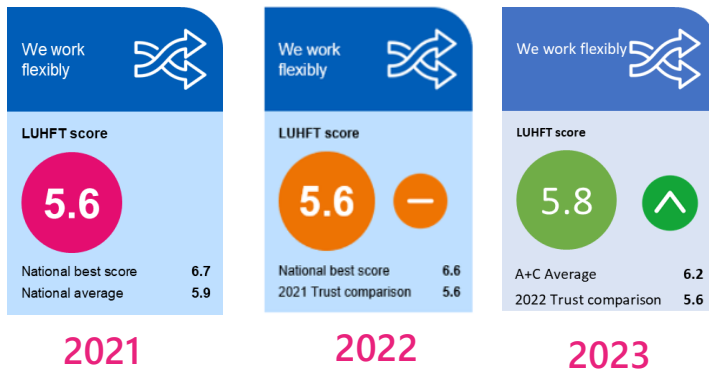
To provide managers with the knowledge and skills to be able to:

- Expand your knowledge regarding the importance of Flexible Working
- Help improve Flexible Working to aid retention
- Understand the new Flexible Working Policy and the key changes
- Apply the policy consistently and fairly
- Understand your responsibilities as a manager
- Effectively use ESR for flexible working requests
- Know where to go for further support



# What colleagues are telling us at LUHFT

## Green shoots? Improvement in NSS Scores



### Methods of engagement

- National Staff Survey 2022/ 2023 results- free text comments
- Let's Talk Culture Conversation
- Monthly People Manager Forum
- Culture Champion Network
- Exit Questionnaire Data

Having a healthy work life balance is key to my wellbeing at work

Previous policy wasn't always fairly applied

Confident and capable people managers are key to ensuring good conversations around flex

Opportunities for flexible working aren't widely known about

# NHS People Promise

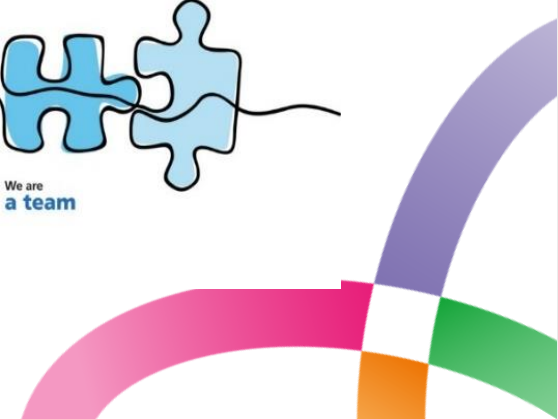
One of the 7 NHS People Promise's is 'we work flexibly'

The Trust is committed to this alongside:-

- Colleague wellbeing
- The NHS People Plan
- Colleagues having greater choice over working patterns
- Improving the offer of flexible working
- Living our own values – caring, fair and innovative.



T



# Why Talk Flex? National Context

Flexible Working is now more important than ever.

## People Promise



The benefits of flexible working are fast and can affect:

**Financial implications of inability to flex at LUHFT**

- Cost of replacing nurses... estimated £12,000 per nurse nationally
- Costs of recruitment, induction, onboarding
- Sickness absence costs
- Cost on agency and bank staff
- Time, resources, productivity, discretionary effort



### TALENT ATTRACTION

**87%** of people either work flexibly already or wish they could.  
**92%** of millennials identify flexibility as a top priority.



### RETENTION AND MOTIVATION

**75%** of employers say that flexible working has a positive effect on retention and **73%** say it improves staff motivation.



### INCLUSION AND DIVERSITY

Flexible working is a key enabler for many carers, parents, older workers and those with health conditions.



### PERFORMANCE

**97%** of managers said the quantity of work improved or stayed the same.  
**93%** of managers said the same about work quality.



### BUSINESS COSTS

Over **70,000** people left NHS employment citing work-life balance addressing this would reduce our agency spend.



# What colleagues told us

Diving deeper into colleague engagement



## Pockets of great practice

- Compressed hours
- Trusting line manager
- Using E-Roster to request shifts
- Reasonable adjustments
- Regularly reviewing



## Things that get in the way

- Access to IT/ Equipment to work agile
- Leaders and Managers (misconceptions and trust)
- Monitoring productivity and performance management
- Lack of awareness of what's out there
- Managing multiple requests and ensuring equitability



## Could be better

- Clear trust-wide guidance and policy
- Support and pathway for declined requests
- Sharing of best practice examples/ case studies
- Cultural shifts in the norm

## Methods of engagement

- National Staff Survey 2022 results- free text comments
- Let's Talk Culture Conversation
- Monthly People Manager Forum
- Culture Champion Network
- Exit Questionnaire Data



# Key Points & Changes

In partnership with staff side colleagues, we agreed a policy that focuses predominately on supporting staff to request flexible working with full consideration from management and the leadership team.

## What is flexible working?

- Flexible working is 'an arrangement which supports an individual to have a greater choice in when, where and how they work'.

## Who is entitled to apply for flexible working and how often?

- All employees employed on a substantive contract can request flexible working from day one of employment and do not have to provide a reason.
- Employees can submit two flexible working applications in a 12-month period.
- Colleagues are encouraged to submit requests 3 months before the ideal start date.

## How long does the process take?

- Legal requirement to fully consider all requests within 60 days of submission.

## How do people apply?

- All formal flexible working requests to be logged and processed via ESR.





# Adhoc vs Formal Requests

## Short term/adhoc arrangements:

Example: shift swapping or infrequent homeworking, temporary removal of night shifts.

Do not change terms and conditions

Can be agreed through informal discussion

Do not need to be recorded through ESR

## Formal flexible working requests:

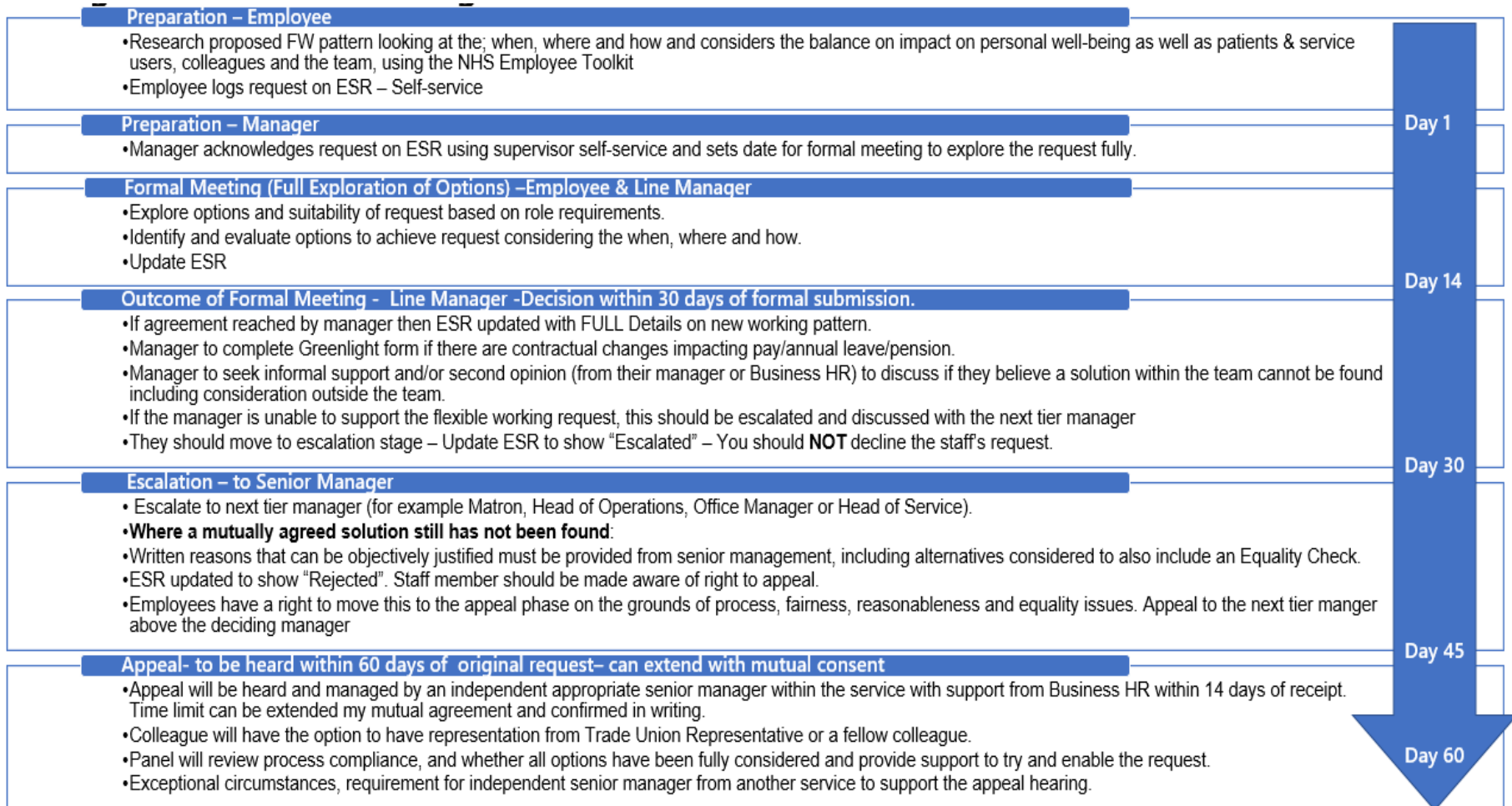
Change terms and conditions of employment

Example: reducing hours, set days of working, compressed hours.

If cannot be accepted immediately, a meeting must be arranged.

Should be requested via ESR.

# Stages of the Flexible Working Process



# Considering a Request

- Full consideration of a flexible working request is key to ensuring we achieve work life balance and safe service needs.
- Openly explore the options and suitability of the flexible working request based on the role requirements. Things to think about include:
  - the costs associated with the proposed arrangement.
  - the effect of the proposed arrangement on other staff
  - the need for, and effect on, supervision
  - the existing structure of the department
  - the availability of staff resources
  - details of the tasks specific to the role
  - the workload of the role
  - whether the employee is making the request in relation to the Equality Act
  - health and safety issues and Working Time Regulations
- If you are unsure if it will work for the individual, team or service, explore the use of a trial period to assess effectiveness.
- If a line manager cannot agree a request based on the application alone, they must escalate and seek advice from their leadership team prior to declining.
- Each request will be considered on a case-by-case basis.



# Outcomes to Flexible Working Requests

## Accept in full:

Confirm the details in writing using template letters.  
Consider the use of a trial period. Consider impact on annual leave.  
Approve via ESR  
Complete a contractual change form on Greenlight, where applicable.


## Compromise:

Discussion of alternative options and agreed variation to original request. Consider use of trial period.  
Confirm decision in writing using template letters.  
Update via ESR. Complete contractual change form on greenlight if applicable.

## Decline:

Only once all avenues have been exhausted can you decline a request (under one of the 8 legal reasons).  
Confirm decision in ESR and in writing using template letters  
Ensure you confirm the right to appeal.

# Appeals Process

- In cases where the employee is unhappy with the decision reached, they have **14** calendar days from date of the outcome to appeal.
  - Formal Appeal Hearings should be conducted by the next tier manager to those making the decision.
  - Business HR representative should be in attendance.
  - The employee has the right to representation.
  - The process **MUST** be concluded within the 60 days legal timeframe
  - If the appeal is accepted – the reasons will be detailed in writing and CCF's should be submitted.
  - If the appeal is not accepted, the reasons should be detailed in writing – there is no further right to appeal.
- 

# Essential 'Must Do's'

Escalation before declining – managers must explore alternative solution and seek further advice from their manager or Business HR.

Consider all the options available and if unable to accept immediately, try to compromise.

The Trust is legally required to fully consider flexible working requests within 60 days and must use ESR to manage requests

Consider the needs of the individual, team and service when making decisions.

Review all flexible working annually during appraisals.

# Effective Management

## Useful pointers for supporting staff:

- ♥ Apply the policy fairly and consistently, whilst considering individual circumstances
- ♥ Act sensitively and confidentially
- ♥ Keep accurate records of your team flexible working arrangements using organisation policies and systems e.g. ESR, Roster, sickness management reports
- ♥ Lead by example by following policies correctly i.e. flexible working, taking breaks, reasonable adjustments
- ♥ Escalate issues and source support for colleagues where appropriate in a timely manner
- ♥ Ensure your team know the policies, behaviour and engagement expected of them
- ♥ Don't put off difficult conversations and don't cancel meetings unless completely unavoidable.
- ♥ Know your colleagues and how to recognise signs and symptoms of stress
- ♥ Establish and keep in regular contact with colleagues who are absent from work and conduct wellbeing discussions on their return to work.



# Guides and Toolkits

- **Manager Guide** – Full of key information and guidance to help you fully consider any requests submitted by your team.
- **Employee Guide** – To help employees understand what type of flexible working options are available and how they may work in practice.
- **Template Toolkit** – This includes template letters to adapt and send to colleagues.
- **ESR Written and Video Guides** – To help individuals understand how to submit a request and managers to process requests via ESR.
- **Agile and Homeworking Guidance** – Replaces the previous policy and should be read in conjunction of the policy when considering home or agile working.
- **Carers Passport** - guidance on supporting unpaid carers outside of traditional flexible working options and using the Carer Passport can be found on the Staff Hub





# Recording Flexible Working

From the 1st June 2024 all employees will be able to request flexible working via ESR and line managers will be able to review, consider and provide an outcome via the system. What are the impacts and benefits of using ESR to record Flexible Working?

## In the short term...

<p><b>Impact of incomplete recording of flexible working:</b></p> <ul style="list-style-type: none"> <li>Managers are currently heavily reliant on paper-based systems and local record keeping</li> <li>Agreements are informally monitored through each manager with no central log of flexible working agreements</li> <li>Lack of clarity in reasons and types of flexible working.</li> <li>Manual entry and updates causing inefficiencies.</li> <li>Historical reliance on local arrangements</li> <li>Unable to provide assurance of fair application of flexible working</li> </ul>	<p><b>Benefits of using ESR:</b></p> <ul style="list-style-type: none"> <li>Employees can log flexible working requests via employee self service</li> <li>Managers will receive a notification and be able to action</li> <li>Centralised log of flexible working within the organisation</li> <li>Ability to report and understand what flexible working arrangements are in place within the organisation</li> <li>Consistency applied</li> <li>No single point of failure – if a manager is absent or leaves, ESR will have a record of the flexible working arrangements</li> </ul>
--	--

## In the long term... A true measure of whether we are a flexible organisation

Satisfaction with Flex Working opportunities



No of people working flexibly



No of Requests made



Requests declined



We work flexibly



# ESR: Overview of the process

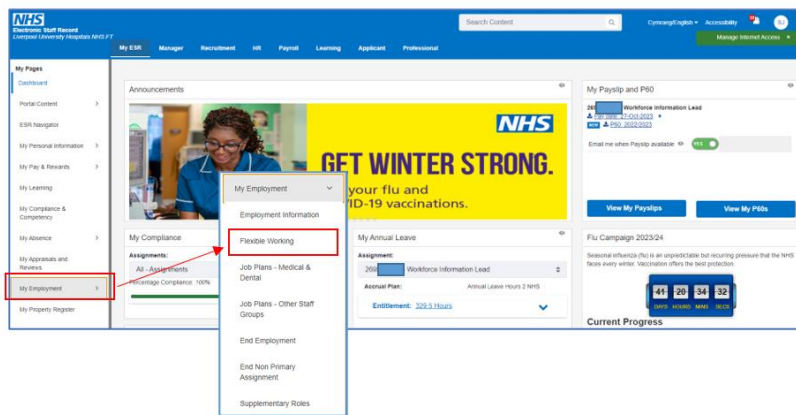
Locally created guide and national video tutorials available on the Staff Hub detailing how to add and manage Flexible Working requests in ESR for both Employees and Managers.



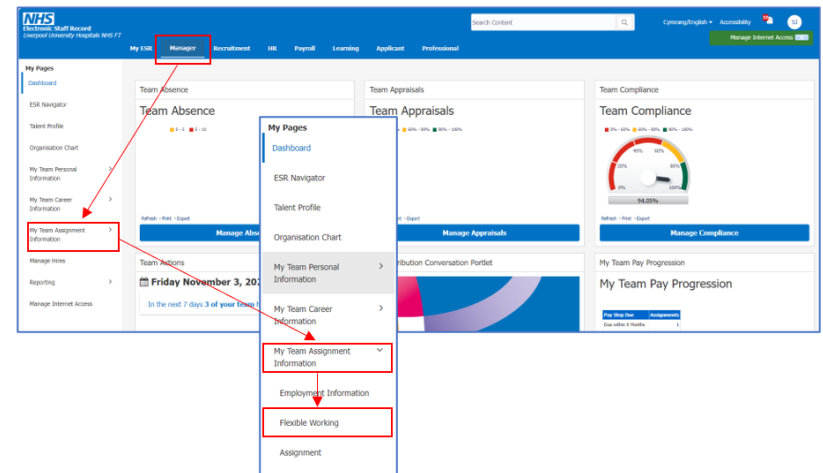
# ESR: Where to find Flexible Working?

Applications for Flexible Working can be submitted and managed within ESR from the ESR Portal Landing Page.

## Employee View



## Manager View



Video Tutorials\* for applicants can be found on the Staff Hub here:

<https://staffhub.liverpoolft.nhs.uk/working-with-us/esr-employee-self-service-guides.htm>

Video Tutorials\* for managers can be found on the Staff Hub here:

<https://staffhub.liverpoolft.nhs.uk/working-with-us/esr-supervisor-self-service-guides.htm>

*\*You must be logged in to ESR to view the videos*



# ESR: Employees

## Employee View

**Request a new flexible working arrangement**

Personal Details

Employee Name  
 Assignment Number  
 Supervisor Name

I would like to apply to work a flexible working pattern that is different to my current working pattern in line with the organisations policy for flexible working.

\* Indicates required field

Flexible Working Request

Date of Application: 21-Jun-2024

Type of Request

Describe your current working pattern

Requested Change

Requested Arrangements

Future Work Pattern

Relevant Supporting Information if you would like to provide it

I would like this working pattern to commence from

Copyright (c) 1998, 2022, Oracle and/or its affiliates. All rights reserved.

Switch to Mobile

FIELD	TYPE	INPUT
Date of Application*	DATE	
Type of Request*	DROP DOWN LIST	<ul style="list-style-type: none"> <li>Agile/Hybrid Worker</li> <li>Annualised Hours</li> <li>Condensed Working Hours</li> <li>Contractual Homeworker</li> <li>Flexible Retirement</li> <li>Flexitime</li> <li>Job Share</li> <li>Other Flexible Working</li> <li>Part Time</li> <li>Part Year Working</li> <li>Partial Retirement</li> <li>Retire and Return</li> <li>Seasonal Working</li> <li>Staggered Working Hours</li> <li>Step Down</li> <li>Team Self Rostering</li> <li>Wind Down</li> </ul>
Describe your current working pattern*	FREETEXT	Describe the working pattern you would like to work (days/hours/times worked)
Requested Change*	DROP DOWN LIST	<ul style="list-style-type: none"> <li>Change working days/shifts</li> <li>Decrease hours – change to <u>PT</u></li> <li>Decrease hours – remain <u>PT</u></li> <li>Increase hours – change to <u>FT</u></li> <li>Increase hours – remain <u>PT</u></li> <li>Other</li> </ul>
Requested Arrangements	DROP DOWN LIST	<ul style="list-style-type: none"> <li>Permanent</li> <li>Temporary</li> <li>Trial</li> <li>Informal</li> </ul>
Future Work Pattern*	FREETEXT	
Relevant supporting information if you would like to provide it	FREETEXT	Add any relevant supporting information to support you flexible working request
I would like this working pattern to commence from	DATE	

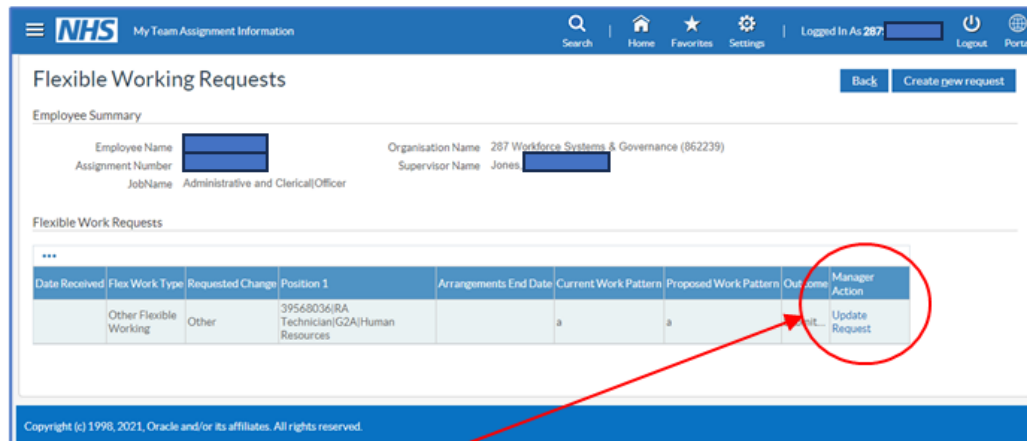
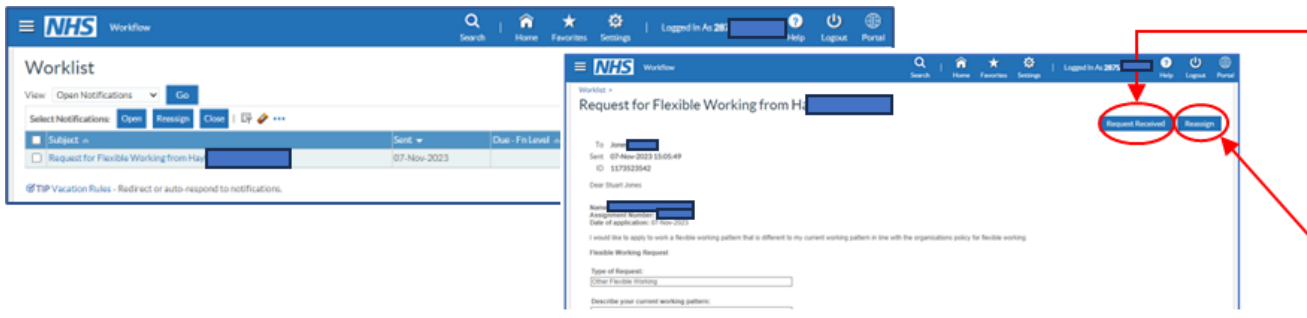
Example Flexible Working screen for employees (above) and the available options for each of the fields (right)



# ESR: Managers

Once the Request has been received details can be viewed via the Flexible Working Requests section, accessible via the ESR Manager Tab. Supervisor access via smartcard is required.

Managers will be notified of requests via the Workflow Notifications. These requests must be 'Request Received' which will prompt a confirmation notice back to the employee in ESR.



**If the immediate supervisor is not the decision maker they should reassign the notification to the appropriate individual at the earliest opportunity.**

To update a request click on 'Update Request' on the Flex Working Requests screen.



# ESR: Managers

## Manager View

**Maintain Employee Flex Work Requests** [Cancel] [Submit]

Employee Summary

Employee Name: [Redacted] Assignment Number: [Redacted]

Flexible Working Request Details

Type of Request: Other Flexible Working  
Date Submitted: 07-Nov-2023  
Date Received: [Calendar Icon]  
Application Complete?: [Dropdown]  
Requested Change: Other

Position 1: 39568036(RA Technician)(G2A)(Human Re  
Position 2: [Dropdown]  
Position 3: [Dropdown]

Current Work Pattern: a  
Future Work Pattern: a

Arrangements and Outcome

Agreed Arrangements: Trial  
Meeting 1 Date: [Calendar Icon]  
Meeting 2 Date: [Calendar Icon]  
Decision Required By: [Calendar Icon]  
Decision Date: [Calendar Icon]  
Outcome: [Dropdown]  
Outcome Details: [Text Field]  
Effective Change Date: 01-Dec-2023  
Process End Date: [Calendar Icon]  
Decision Letter Sent: [Calendar Icon]

Copyright (c) 1998, 2021, Oracle and/or its affiliates. All rights reserved.

### **Flexible Request Details**

Request details as submitted by your team member.

*[IMPORTANT: Statutory 60 day limit from this date to fully respond to the request]*

### **Response Section**

Responses to Flexible Working request to be entered here. When agreed populate the Outcome field and the Decision Date field. Don't forget end dates should agreements be temporary.

# ESR: Notifications

Requesting staff (and their ESR Supervisor) will receive system generated notifications to support the Flexible Working Request process.

## Action: Request Received

**Request Received** **Resign**

To: Harrison, Ann  
Sent: 23-Nov-2021 15:52:32  
ID: 142646

Dear Ann Harrison

Name: Tamara Clarke  
Assignment Number: 2006044  
Date of application: 23-Nov-2021

I would like to apply to work a flexible working pattern that is different to my current working pattern in line with the organisations policy for flexible working  
Flexible Working Request

Type of Request:  
Annualised Hours

Describe your current working pattern:  
Part Time

Requested change:  
Increase hours - remain FT

Requested arrangements:  
Trial

Describe the working pattern you would like to work in the future:  
Monday to Friday 9 am to 3pm

I would like this working pattern to commence from:  
03-Nov-2021

'Request Received' triggers a notification to the employee



**Information**  
This notification does not require a response.

**Confirmation of receipt of application for flexible working** **OK**

To: Clarke, Tamara  
Sent: 07-Dec-2021 15:42:54  
ID: 148648

Dear Tamara Clarke

I confirm that I received your request to change your work pattern on: 07-Dec-2021.

I will arrange a meeting with you to discuss your request.

You will be notified of the decision on this application within three months of this date, unless a longer deadline for this is agreed.

Ann Harrison

## Notification: Decision Date Missing

**Worklist**

**Information**  
This notification does not require a response.

**Flexible Working Decision Date Not Entered for Richard Perkins** **OK** **Resign**

To: Harrison, Ann  
Sent: 05-Nov-2020 11:19:58  
ID: 132602

Please note that a decision date has not been entered against the application for flexible working from Richard Perkins. Applications for flexible working require a response within 3 months of receipt. Please ensure that the applicant has received a response by 05-Dec-2020, and update the record in ESR accordingly.

## Notification: Flexible Working agreement due to end

**Worklist**

**Information**  
This notification does not require a response.

**End of Flexible Working Arrangements for Richard Perkins** **OK** **Resign**

To: Perkins, Richard  
Sent: 05-Nov-2020 11:27:47  
ID: 132603

The flexible working arrangements for Richard Perkins were recorded in ESR as 'Temporary', with an end date of 19-Nov-2020. Please review the record held in ESR and make any amendments to the agreed arrangements as required, ensuring this has been discussed with the employee as necessary.

## Notification: Request withdrawn

**Worklist**

**Information**  
This notification does not require a response.

**Withdraw Flexible Working Request from Richard Perkins** **OK** **Resign**

To: Harrison, Ann  
Sent: 05-Nov-2020 11:07:56  
ID: 132600

Please note that Richard Perkins has withdrawn their current application for flexible working arrangements.

# ESR: Key points to remember

- At application stage Flexible Working Requests can only be sent to the immediate supervisor. If the immediate supervisor is not the 'decision maker' they must use the Reassign function to redirect the workflow notification to the appropriate manager.
- Applications should be managed through to full completion within 60 days of receipt of the request. This includes updates to other systems, e.g. ESR, Roster etc, as necessary.
- ESR provides an auditable log of applications and outcomes. ESR data will be used for governance purposes to monitor compliance with legislation.
- If managers have any ESR access issues, problems with their smartcard or problems with the supervisor hierarchy please contact [workforce@liverpoolft.nhs.uk](mailto:workforce@liverpoolft.nhs.uk) as soon as possible for support.





Any questions?



# HR Team Contact Details

Medicine	
Aintree	Royal
HR Advisor – Laura McDonough 0151 529 3029 Hr Manager – Rachel Chong 0151 529 4367 HR Business Partner – Alison McCann 0151 529 0407	HR Advisor – Megan Hilton HR Manager – Joanne Owens 0151 706 5336 HR Business Partner – Alice Wood 0151 529 2363
Surgery	
Aintree	Royal
HR Advisor – Megan Young-Howard 0151 529 5731 HR Manager – Megan Rea 0151 529 2883 HR Business Partner – Stephanie Scales 0151 529 0689	HR Advisor – Olivia Butler 0151 706 3893 HR Manager – Lauren McClymont 0151 706 2866 HR Business Partner – Clare Vickers 0151 706 2269
Broadgreen & LCL	Corporate
HR Advisor – Isabelle Rowan 0151 706 4450 HR Manager – Rebecca Heath 0151 706 6158 HR Business Partner – Yvonne Malkin 0151 706 5187	HR Advisor – Ellen Stranack 0151 529 4427 HR Manager – Daniel Coleman 0151 529 3216 HR Business Partner – Kath Aistrop 0151 529 2229
Diagnostics & Support Services	
HR Advisor – Robert Wedge 0151 706 2944 / 0151 529 8053 HR Manager – Jessica Millington HR Business Partner – Sinead Harrop 0151 706 3895 / 529 3225	



# Thank You

The new Policy can be found on the Staff Hub >  
Flexible Working Policy

