

Hybrid Workplace Policy Guidance – Line Manager

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Action	Supporting information
Familiarise yourself with the policy	The Hybrid Workplace policy must be read in conjunction with this guidance. The policy is intended to instil a consistent standard across the University and set clear expectations of on-campus and off-campus working.
Familiarise yourself with the policy's Equality Impact Assessment	In order to make informed decisions which are fair and equitable on whether working in a hybrid manner can work, it is beneficial to familiarise yourself with the policy's Equality Impact Assessment – under HR – Hybrid Workplace Policy . This document highlights some of the various equality matters to be aware of in your decision-making.
What is the difference between Hybrid Working and Flexible Working?	<p>Hybrid working is an informal way of managing employee requests to work a mixture of ad-hoc, occasional and regular patterns that will involve working on and off campus within existing contractual agreements. It usually means that individuals undertake some of their work at their contractual place of work (usually on campus) and some off-campus (usually at home/reasonable commuting distance from the University campus). Hybrid arrangements agreed under this policy will be deemed to be informal in nature and subject to regular review. Therefore, employees are expected to attend campus when required, with reasonable notice. For example, to meet in-person customer demand, face to face teaching or attend a meeting/event. This means the hybrid arrangements are not constrained by a formal fixed pattern of off-campus days and therefore, allows flex to meet operational needs.</p> <p>In accordance with the Hybrid Workplace policy, if an employee requests to change their work location arrangements, it is expected in the first instance, a discussion will take place with their manager.</p> <p>The Flexible Working Policy sets out how an employee may go about requesting a permanent change to their work arrangements. The policy could be used for permanently reducing working hours, changing a work pattern and/or workplace location. If an employee wishes to submit a flexible working request to change their workplace location e.g. to fixed days each week working off-and on-campus (or if location is part of a request to change their working hours/pattern), they should first discuss with their manager. It may be the case that a combination of the two policies are adopted e.g. the Hybrid Workplace policy is more appropriate for the proposed workplace location arrangements and the Flexible Working policy for the working hours/pattern change.</p> <p>If after a discussion with the manager, an employee decides to submit a flexible working request, this should be considered in line</p>

	<p>with the Flexible Working policy. If the request is agreed, this would result in a change to the employees' contract of employment meaning that arrangements are fixed. The flexible working arrangements are permanent and guaranteed in the role (pending the conclusion of a trial period which may be put in place). Before agreeing to a flexible working arrangement, you should consider any implications which may arise. For example, fixing workplace locations on specific days each week means there isn't the same scope to informally discuss and agree alternative, ad-hoc arrangements such as in person meetings or attending an event.</p> <p>It is possible to work in an informal hybrid way and have a formal flexible working agreement in place at the same time. For example, an employee has an agreed formal flexible working arrangement working part-time hours over 3 days per week and these 3 days are worked in an informal, hybrid manner with 2 on campus and 1 off-campus days.</p>
<p>Understanding the concept of Hybrid Workplace</p>	<p>Under the Policy Scope section 2, it outlines that the policy applies to all employees of the University who hold roles that can be performed in part, off-campus.</p> <p>The Hybrid Workplace policy offers a route for employees to request to work some of the time from a suitable off-campus location.</p> <p>As defined within the policy, off campus refers to any work that is delivered from a location that is not a University of Edinburgh building or site, including home or other appropriate space, which must be within a reasonable commuting distance of the Edinburgh campus.</p> <p>Requests can be made to work from home (or an alternative suitable location off campus) on an ad hoc basis e.g. whenever the nature of the work allows, varying from week to week or month or month, or with an agreed, set pattern e.g. every Monday and Thursday, or three afternoons per week on set days.</p> <p>The policy intentionally does not set out minimum or maximum proportions of time to be spent on campus, other than to clarify that fully remote working i.e. working 100% of the time off-campus, is not permitted. The University campus remains the centre of gravity for all employees, meaning it is the focus of University activity. Therefore, the expectation for those employees who adopt hybrid working, is that there will be regular on-campus working.</p> <p>Due to the size and complexity of the organisation, there is no one-size-fits-all approach that can be applied across the University. You therefore have discretion to determine what works best within your team/function. You should ensure you are aware of any school or department guidelines that are already established.</p>

	<p>Any requests agreed through this policy will remain informal i.e. the agreed arrangements will not become permanent or result in a change of the contract of employment e.g. working pattern, hours or location. Therefore, no correspondence confirming hybrid working arrangements is issued by HR Operations. This is different to the Flexible Working policy in this regard.</p>
<p>Receiving a request</p>	<p>You are required to discuss your employee’s hybrid workplace request and this must be agreed by you before being implemented.</p> <p>Due to the informal nature, there is no formal request form, as there is for other policies such as Flexible Working. Therefore, you may have a verbal conversation with your employee or they put a request in writing, via email for example.</p> <p>On receipt of a request, you should establish whether the request is in line with the policy i.e. it is for an informal arrangement to work off-campus, either on set days, part days, or more ad hoc in nature, e.g. occasional or variable off-campus working.</p> <p>If the employee is requesting a formal, permanent change to their working arrangements, or their request is for a reasonable adjustment i.e. to mitigate the impact of a disability for example, then you should refer to the Flexible Working policy. The Workplace Adjustments Form – guide for staff and managers and your local HR Partner is available to support a disability related conversation.</p>
<p>Considering a request</p>	<p>You must give serious consideration to any hybrid working requests received.</p> <p>In addition, you should ensure you are familiar with the policy’s Equality Impact Assessment under <i>HR – Hybrid Workplace Policy</i> as part of your considerations in how to address these impacts <u>before</u> approving or declining the request.</p> <p>Your considerations must be in line with the principles set out in section 4 of the policy.</p> <p><u>You should ensure:</u></p> <ul style="list-style-type: none"> • All requests are considered fairly and take account of those who wish to work solely on campus, so that the work is organised to ensure those working on campus are not unfairly impacted • Effective team working and service delivery is not compromised • No other employee is negatively impacted by the hybrid workplace request

	<p><u>You should also consider:</u></p> <ul style="list-style-type: none"> • The nature of the role and/or work being carried out, the service requirements or other outputs or deliverables • The role hybrid working may play in supporting department/school delivery • Any work priorities and the resource requirements (e.g. for essential on campus/in person activity) • The impact on the available office, laboratory or collaborative space and IT infrastructure • What elements of the role can be delivered off campus • What are the benefits vs challenges of this request • Are these compatible with the nature of the work and the work of the wider team • It may be appropriate to hold conversations at team level to jointly work through and agree preferences and how these would overlap in practice • How you will manage and support all of your team equally in the future, whatever their working arrangements • If the request doesn't appear feasible, are there alternatives or compromises that can be identified (e.g. if required on-campus, can there be flexibility around timing/hours) • Being open-minded and think creatively about ways to enable hybrid working while delivering the team's objectives <p>If you are a recruiting manager, you may discuss with an applicant at interview stage about their existing or requested hybrid working arrangements. You should consider whether you can accommodate the arrangement taking into account the context of the role, the wider team and business needs. If existing arrangements cannot be accommodated, you should discuss and consider any alternative arrangements. You should inform the person and the reason(s) for your decision.</p>
<p>Initial Discussion</p>	<p>Following a request from an employee, a discussion must take place. Ideally this will take place at the earliest available opportunity. This discussion can take place remotely e.g. via MS Teams, telephone or in person. This could also be during a one to one meeting or a more focussed meeting where any identified issues and solutions can be explored.</p> <p>You can provide an overview of the parameters of the Hybrid Workplace policy at the start of the discussion. The employee should be given the opportunity to explain their request and describe how their preferences take into account the business needs. An important principle with this discussion is transparency.</p>

	<p><u>The purpose of the discussion is to:</u></p> <ul style="list-style-type: none"> - enable you and your employee to positively engage in a discussion about the request - fully explore working arrangements whilst balancing the needs and preferences of both the University and the employee including any mitigating factors <p>The discussion should be approached with an open mind and a genuine desire to work together. You should try to determine suitable working arrangements that take into account the need to collaborate within the department and across teams; the wider University; role requirements and deliverables as well as individual preferences and personal circumstances.</p> <p>Details of the discussion may be recorded during a one to one or a separate meeting. This can be shared with the employee. Alternatively, an email can be sent from you to the employee confirming the discussion. You must retain a record of these agreed arrangements.</p>
<p>Reaching a Decision</p>	<p>Having gathered all the relevant information, you are expected to be open about the considerations made. Your decision should be inclusive, fair and equitable and you should be able to show a clear rationale for how decisions have been made, without bias or favouritism.</p> <p>For many requests, reaching a decision will be straightforward and acceptable to the employee.</p> <p>You must maintain an up to date record of all your team's agreed working arrangements, detailing the requests of those agreed and declined. A record of these arrangements must be retained.</p> <p><u>Initial discussion outcome - agree:</u></p> <p>Following the initial discussion, if you are in agreement with the request, you should have a further discussion following your decision.</p> <p>The purpose of the further discussion with the employee is to:</p> <ul style="list-style-type: none"> • Set out expectations, such as best practice ways of working, and including the guidance within Recording Where you are working - FAQs. Also, health and safety information for working off campus. • their communication with colleagues and students • their engagement with work • Ensure the correct IT equipment is in place • Ensure health and safety arrangements is fully considered

- Confirm that the employee is expected to attend a meeting, teaching or an event on campus, where required, with reasonable advance notice
- Confirm that hybrid workplace arrangements will apply only to the role the employee currently holds i.e. it will not automatically transfer to any future roles at the University
- Confirm that the arrangements are subject to regular review
- The arrangements may be regularly discussed in one-to-one meetings and may require action to address any issues and concerns. The arrangement will be formally reviewed and confirmed, at least, on an annual basis. This ensures the agreed ways of working continue to be effective for all parties concerned.

You must confirm your agreement to the request as soon as is reasonably possible, by email. The informal agreement **will not** result in an amendment to the employee's contract of employment e.g. HR will not issue a letter confirming amendments. You must retain a record of the agreed arrangements.

Initial discussion outcome – further information required:

If more information is required before a decision can be reached, a further meeting may be necessary and the employee should be informed when they are likely to hear an outcome.

Where required, advice may be sought from specific support departments such as your local HR Partner, Occupational Health, Health and Safety etc to help you reach a fair decision.

During a further discussion with the employee, you may suggest an alternative arrangement or modifications if the original request cannot be agreed. Additionally, you may discuss and agree trying out the employee's requested or modified working arrangements to gauge whether it can be made to work for all parties e.g. employee, colleagues, students. This would normally last for around twelve weeks before you review the arrangements. However, the review period may vary depending on the nature of the role and circumstances. Hybrid working should not alter an employee's role, responsibilities or overall working hours. You should ensure that employee can put forward potential solutions to any concerns which they have, albeit the final decision on the arrangements rest with you.

If you agree to the alternative arrangement, you should meet with the employee with the purpose to:

- Set out expectations, such as best practice ways of working and including the guidance within [Recording Where you are](#)

	<p>working - FAQs. Also, health and safety information for working off campus.</p> <ul style="list-style-type: none"> • outline their communication with colleagues and students • outline their engagement with work • Ensure the correct IT equipment is in place • Ensure health and safety arrangements is fully considered • Confirm that the employee is expected to attend a meeting, teaching or an event on campus, where required, with reasonable advance notice as agreed between you • Confirm that hybrid workplace arrangements will apply only to the role the employee currently holds i.e. it will not automatically transfer to any future roles at the University • Confirm that the arrangements are subject to regular review. • The arrangements may be regularly discussed in one-to-one meetings and may require action to address any issues and concerns. The arrangement will be formally reviewed and confirmed, at least, on an annual basis. This ensures the agreed ways of working continue to be effective for all parties concerned. <p>You must confirm your agreement to the alternative arrangement with your employee as soon as is reasonably possible, by email. The informal agreement will not result in an amendment to the employee’s contract of employment e.g. HR will not issue a letter confirming amendments. You must retain a record of these agreed arrangements.</p> <p><u>Initial discussion outcome – decline:</u></p> <p>If, after careful consideration of all the relevant factors, including either considering and/or trying alternative arrangements, you conclude that the request is not feasible for operational reasons, you may decline the request. You must discuss this with your employee including the reasons for declining the request.</p> <p>You may wish to discuss the reasons for declining the request with your local HR Partner. Following your discussion, you should confirm this with your employee as soon as is reasonably possible, by email. You must retain a record of the agreed (and declined) arrangements.</p> <p>As the hybrid working request is informal in nature, there is no employee right to be accompanied at meetings or to appeal the outcome.</p>
<p>Reviewing the arrangement</p>	<p>New ways of working can bring some significant changes. Once a new arrangement has been agreed, whether at individual or team level, this should be tested in practice to ensure it is optimal for the work being carried out.</p>

	<p>You should plan periodic reviews, for instance, during one to one meetings, to check-in on how it is working, easing these over time if it is a success. This is also an opportunity to address any issues or concerns in good time to ensure that effective ways of working continues for all concerned. The arrangement must also be reviewed and re-confirmed on at least an annual basis. You must retain a record of these reviews.</p> <p><u>Circumstances where arrangements are not working well:</u></p> <p>You should encourage your employee to be open with you and where they are finding an element of their agreed working arrangement problematic, to raise it as soon as possible so the concerns can be addressed. There is no requirement for you or your employee to wait until a scheduled review is due.</p> <p>Any concerns should ideally be resolved locally. If you consider that the arrangements are not satisfactory, you will discuss this with your employee at the earliest opportunity and provide reasons for this. Sensitivity is required in approaching the conversation. Using specific examples as to why you consider the arrangement may not be working well or how certain ways of working could be improved can be a good way to start the conversation.</p> <p>If feasible, an option may be to mutually agree to trial an alternative arrangement and put in place a short review period. Following agreement with your employee, you should confirm this with them as soon as is reasonably possible, by email.</p> <p>Where individual and departmental circumstances change, the hybrid working agreement may also be reviewed.</p> <p>You should maintain an up to date record of all your team’s working arrangements, detailing the agreed requests and agreements. You may retain a record of these arrangements.</p>
<p>Withdrawal of working arrangements</p>	<p>Where you identify individual performance issues, advice, on a case-by-case basis, can be sought from your local HR Partner. For instance, where the arrangement has led to identifiable negative impacts or where the individual/team are failing to meet agreed performance standards or the principles of the policy.</p> <p>In circumstances where support is provided and improvement to the situation remains unsatisfactory, you may withdraw the working arrangement. You must explain to the employee the reasons why. This discussion can take place remotely e.g. via MS Teams, telephone or in person. This could also be during a one to one meeting. You should confirm this with your employee as soon as is reasonably possible, by email.</p>

	<p>The University has the right to revoke the hybrid working arrangement. You may require the employee to work on campus more often, all of the time and/or revert to a previous arrangement.</p> <p>Where individual and departmental circumstances change, the hybrid working agreement may also be reviewed or revoked. You must give the employee reasonable notice prior to any changes to arrangements including on campus working.</p>
Working outside the UK	<p>This policy should not be followed for any hybrid working where the location is outside of the UK. You should follow the University overseas working framework if you have employee planning to carry out University work abroad. More information can be found on the Working Abroad webpages</p>
Additional Support & Resources	<p>Further support, information and resources are highlighted under Section 7 of the Policy, including Also, health and safety information for working off campus.</p>
Be aware of Data protection and Subject Access Request requirements	<p>Information relating to a request should be held in line with the University's Retention Schedule. This includes any email correspondence and not just letters about the outcome of the hybrid working request.</p> <p>Remember that an employee may make a subject access request to see data about their request which will include any emails between you and HR and anyone else you correspond with about the individual or the request. Therefore you must be prepared that any of your correspondence may be seen by the employee.</p>