

Flexible Working Request Meeting Notes Template and Outcome Letter

Manager Guidance:

- Flexible working requests will only be processed with the meeting notes and outcome letter (letters issued by management for declined requests only).
- You are required to meet with the colleague within **28 days** of the request. The outcome letter must follow within **14 days**.
- Please remove guidance in blue and red.

Flexible Working Request Meeting Notes

Colleague's Name:			
Role Title:			
Line Manager's Name:			
Role Title:			
Representative's Name:			
Role Title:			
Date of Meeting:			
Meeting Held At:			
Start Time:		End Time:	

1. I welcomed you to the meeting and thanked you for attending the meeting.
2. I explained that the formal meeting has been arranged to discuss your flexible working request. I confirmed that you were entitled to five working days' notice of the meeting; however you waived your right to this notice **OR** You were entitled to and requested five working days' notice of the meeting.
3. I advised you that I would be taking summary notes of the meeting and that you will receive a copy of the summary notes after the meeting to review and sign. I explained that following the meeting I would review whether or not the request can be accepted or declined.
4. I explained your right to be accompanied by a colleague or trade union representative at the meeting. I acknowledged that you **were not accompanied and asked you to confirm that you were happy to proceed unaccompanied/were accompanied by NAME your colleague/ trade union representative and that they were attending to accompany you in the hearing and to provide you with support during the meeting. I explained that NAME could ask questions however (Representative's Initials) was not permitted to answer questions on your behalf.**
5. We discussed that your request was to permanently **OR** temporarily for **TIME PERIOD** change your work pattern of **XX** hours per week, working **WORKING DAY to WORKING DAY, START TIME to FINISH TIME**, to work **XX** hours per week **WORKING DAYS, START TIME to FINISH TIME**, with effect from **COMMENCEMENT DATE**.
6. You advised during our meeting that your request was to allow you to **REASON FOR REQUEST (please note the reason should not impact the decision).**
7. We discussed whether there was any flexibility with your request and any alternative working patterns that you wanted me to consider. **(Please provide a detailed explanation of what was discussed.)**
8. We referred to section 13 and 14 of your flexible working application form and discussed the potential impact of your request on the Society/colleagues/customers etc. **(Please provide a detailed explanation of what was discussed.)**

9. (Please provide a summary of all other information discussed)

Meeting adjourned at XXTIMEXX

Meeting recommenced at XXDATEXX XXTIMEXX

10. I explained that following the adjournment I had considered all of the points discussed during the meeting and the content of the application form.

1) Accepting a request:

I confirmed that your request to work XX hours per week WORKING DAYS, START TIME to FINISH TIME, with effect from COMMENCEMENT DATE had been accepted subject to a X month trial period. I explained that People Services would confirm the change in writing to you directly.

2) Declining a request

I confirmed that your request to work XX hours per week WORKING DAYS, START TIME to FINISH TIME, with effect from COMMENCEMENT DATE had unfortunately been declined due to the following business reason/s:

(Please provide a detailed explanation regarding why any of these reasons apply next to the applicable reason below.)

- Burden of additional costs.
- Detrimental effect on ability to meet customer demand.
- Inability to reorganise work among existing staff.
- Inability to recruit additional staff.
- Detrimental impact on quality.
- Detrimental impact on performance.
- Insufficiency of work during the periods the employee proposes to work.
- *Planned structural changes (please see option 3)*

Alternative not agreed

- We discussed alternative options and you/I proposed an alternative working pattern to work XX hours per week, WORKING DAY, START TIME to FINISH TIME.
- However you confirmed you were unable to agree this work pattern due to COLLEAGUE REASONS.
- OR I explained that I was unable to accept the request due to BUSINESS REASONS (Please provide a detailed explanation regarding why these reasons apply.)
- I confirmed your right of appeal against the decision and said should you wish to exercise this right you should do so in writing to Becky Craven, Head of HR and Development, within 5 working days of receipt of the letter confirming the outcome of the hearing, stating your grounds for appeal.
- I explained that should a ROLE TITLE vacancy arise within the Customer Service Centre/DEPARTMENT NAME matching the hours requested within the next 12 months, we will look to discuss the vacancy with you.

Alternative agreed

- ### 3) Declining a request due to planned structural changes

- 4) I asked you if you had any questions. You confirmed you had no questions/ You asked (*populate questions asked*).

I trust the above is an accurate record of the Flexible Working Meeting held on DATE

COLLEAGUE NAME _____ DATE _____

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*****People Services will draft the letter where requests are accepted.

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NAME

Department or Address (if absent from work HR can provide this)

DATE

Dear NAME

Flexible Working Request

I am writing to confirm the outcome of your flexible working request following our meeting on DATE

During the meeting on DATE, you were given the opportunity to discuss your request in detail and provide any further information you considered to be relevant. You had the right to be accompanied to this meeting however you confirmed that you were happy to continue with the meeting unaccompanied OR and you chose to be accompanied by XXXXX.

You were also aware that you were entitled to five working days notice of the meeting; however you waived your right to this notice OR You were entitled to and requested five working days notice of the meeting.

I confirmed that your request was to permanently OR temporarily for TIME PERIOD change your work pattern of XX hours per week, working WORKING DAY to WORKING DAY, START TIME to FINISH TIME, to work XX hours per week WORKING DAYS, START TIME to FINISH TIME, with effect from COMMENCEMENT DATE. You advised during our meeting that your request was to allow you to REASON FOR REQUEST.

1) Declining a request

I confirmed that your request to work XX hours per week WORKING DAYS, START TIME to FINISH TIME, with effect from COMMENCEMENT DATE had unfortunately been declined due to the following business reason/s:

(Please provide a detailed explanation regarding why any of these reasons apply next to the applicable reason below.)

- Burden of additional costs.
- Detrimental effect on ability to meet customer demand.
- Inability to reorganise work among existing staff.
- Inability to recruit additional staff.
- Detrimental impact on quality.
- Detrimental impact on performance.
- Insufficiency of work during the periods the employee proposes to work.
- *Planned structural changes (see option 3)*

Declining a request, where alternatives are discussed

Alternatives not agreed

- We discussed alternative options and **you/I** proposed an alternative working pattern to work **XX** hours per week, **WORKING DAY, START TIME to FINISH TIME**.
- However you confirmed you were unable to agree this work pattern due to **COLLEAGUE REASONS**.
- OR I explained that I was unable to accept the request due to **BUSINESS REASONS** (Please provide a detailed explanation regarding why these reasons apply.)
- I confirmed your right of appeal against the decision and said should you wish to exercise this right you should do so in writing to Becky Craven, Head of HR and Development, within 5 working days of receipt of the letter confirming the outcome of the hearing, stating your grounds for appeal.

Alternatives agreed

- We discussed alternative options and **you/I** proposed working **XX** hours per week, **WORKING DAY, START TIME to FINISH TIME**.
- I confirmed that I was able to accept this alternative request with effect from **DATE** on a **three/six month** trial basis.
- I explained that as your original request had been declined that you have the right of appeal against the decision and said should you wish to exercise this right you should do so in writing to Becky Craven, Head of HR and Development, within 14 working days of receipt of the letter confirming the outcome of the hearing, stating your grounds for appeal.

2) Declining a request due to planned structural changes

- I confirmed that your request to work **XX** hours per week **WORKING DAYS, START TIME to FINISH TIME**, with effect from **COMMENCEMENT DATE** had unfortunately been declined due to planned structural changes (Please provide a detailed explanation regarding why these reasons apply.)
- I confirmed that we would look to review the request in approximately **MONTH YEAR** following the **SPECIFIC PLANNED STRUCTURAL CHANGES**.
- I confirmed your right of appeal against the decision and said should you wish to exercise this right you should do so in writing to Becky Craven, Head of HR and Development, within 14 working days of receipt of the letter confirming the outcome of the hearing, stating your grounds for appeal.

Should you have any queries please do not hesitate to contact me directly.

Yours sincerely

NAME

ROLE

***Please send the outcome letter, meeting notes and updated application form to your HR Adviser.**

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FORENAME SURNAME
DEPARTMENT

DATE

Dear NAME

Flexible Working Meeting

I am writing to acknowledge receipt of your Flexible Working Application Form received on DATE, in line with the Group's Flexible Working Policy.

A meeting has been arranged to discuss the request in more detail on DATE at TIME, in MEETING ROOM, Portland House Office OR Cobalt Office.

(Please ensure the colleague is provided with 5 working days' notice of the meeting, unless the colleagues waives this right to notice)

In accordance with the Flexible Working Policy you are entitled to be accompanied by a colleague or union representative. Where you wish to exercise this right to be accompanied please advise me in writing, in advance of the meeting to ensure we can make appropriate arrangements.

Please find enclosed/attached a copy of the Society's Flexible Working Policy for your information.

Please confirm your attendance at the meeting to me.

Yours sincerely

MANAGER ROLE
MANAGER ROLE TITLE