

RENFREWSHIRE VALUATION JOINT BOARD



FLEXIBLE WORKING POLICY

| | |
|-------------------------|-------------------------|
| Title | Flexible Working Policy |
| Author | Kate Crawford, Assessor |
| Approved By | Management Team |
| Date of Approval | |
| Reviewer | PAO |
| Review Date | As required |

Review History

| Review No. | Details | Release Date |
|-------------------|--------------------------------------------|---------------------|
| 1 | Replaces Right to Request Flexible Working | |

1. Purpose

- 1.1 Renfrewshire Valuation Joint Board is committed to adopting new ways of working which assists in the process of modernising service delivery whilst promoting work-life balance for employees.
- 1.2 The Board appreciates that employees increasingly have family or caring responsibilities which impacts on their time and recognises that flexible working arrangements may assist them in redressing the balance between work and family or caring commitments, while continuing to meet the needs of the service provision. Flexible working may also support employees during periods of study or other commitments.
- 1.3 The Board recognises that flexible working arrangements can increase employee motivation, retain key, valued employees, reduce absence levels and stress, and it can be a valuable recruitment tool in attracting new talent.

2. Policy Aims

- 2.1 The Board aims to ensure the fair and equitable treatment of all employees under this policy regardless of age, disability, sex, sexual orientation, race, religion or belief, being pregnant or on maternity leave, being married or in a civil partnership, or being in the process of or having undergone gender reassignment. Additionally, the Board is committed to:
 - ensuring all supervisors, managers and employees are aware of and understand this policy and procedures;
 - ensuring all approved applications for flexible working support service/business needs;
 - supporting and encouraging a culture where employees are confident and can discuss work-life balance issues with their manager, and where appropriate, how flexible working could assist in redressing the balance;
 - ensuring that flexible working requests are dealt with quickly, fairly and consistently, and where a request is refused, that the business reasons for the refusal are communicated to the employee;
 - undertaking positive action where appropriate, meaning the Board can take steps to address the different needs of disadvantaged or low participating people who share a protected characteristic. For example, equality law allows the Board to treat an employee with a disability more favourably than an employee with no disability.
- 2.2 The Board is also committed to making reasonable adjustments to remove barriers, avoiding discrimination for employees:
 - who have a disability;
 - who proposes to, starts or has completed the process of gender reassignment;
 - who have a religion, belief or lack of religion or belief; or
 - who are associated with other protected characteristics as defined in 2.1 above.

3. Scope

- 3.1 This policy and associated procedures extends to all Board employees covered by Local Government Terms and Conditions.
- 3.2 Only one flexible working request may be made within a 12-month period, regardless of whether or not it is approved or declined. Only in circumstances as defined by the Equality Act 2010 will an employee be able to submit more than one request for flexible working in a 12-month period. Refer to 2.2 above for examples of where this would be appropriate.
- 3.3 Information on requesting flexible working is available in the Flexible Working Procedures document.

4. Legal Framework

- 4.1 Legislation that should be taken into account when dealing with flexible working requests and issues are:
 - Flexible Working (Procedural Requirements) Regulations 2002
 - Flexible Working (Eligibility, Complaints and Remedies) Regulations 2002 – and subsequent amendments 2006 and 2007
 - Work and Families Act 2006
 - Employment Act 2002
 - Equality Act 2010

5. What is Flexible Working?

- 5.1 The Employment Act 2002 introduced the statutory right for employees to request flexible working providing they meet the qualifying conditions. In terms of the above Act and the subsequent amendments, the Board has a statutory duty to consider these requests to work flexibly. All requests will be considered in accordance with the procedures detailed in the Flexible Working Procedures. Managers may only refuse requests where there is a clear business reason for doing so.
- 5.2 For consistency, all requests for flexible working must follow the statutory process. Information on the statutory right to request flexible working is available in the Flexible Working Procedures document.
- 5.3 Employees through a flexible working request, have the right to request changes to their terms and conditions in a number of areas which must include:
 - the hours an employee is required to work;
 - the times when an employee is required to work, i.e. work pattern;
 - the location/where and employee is required to work.

- 5.4 There is no automatic right for employees to have their request agreed and each application is considered on the basis of the particular work involved and the effects of the proposed change to working arrangements will have on the individual employee, his/her team and overall business needs of the service.
- 5.5 Flexible working requests if granted are permanent contract variations but it may be possible to agree a flexible working arrangement for a temporary period. At the end of the temporary period a review of the arrangement should take place to confirm whether the arrangement is terminating on the agreed date, being extended for a further period, or if the arrangement is to become a permanent change.
- 5.6 Where a request is declined, the manager is required to give clear business reasons for doing so and these should be detailed in the written response to the employee.
- 5.7 Where employees have a caring responsibility, flexible working may allow them the required time away from work to deal with these responsibilities. Employees **should not** be working and carrying out their caring responsibilities at the same time, i.e. working from home while caring for children at home.

6. Benefits of Flexible Working

- 6.1 Flexible working practices can provide many benefits to employees, services, the Board and the customers of the Board. Benefits include:
- improving customer service by having greater flexibility in service provision and longer opening hours;
 - improving turn-around time;
 - supporting recruitment and retention, especially in key skill shortage areas;
 - reducing sickness absence levels;
 - decreasing requests for special leave;
 - improving motivation, morale and productivity levels;
 - supporting the Board's equality agenda;
 - assisting employees to achieve a greater work-life balance;
 - supporting cultural change leading to a modernised and improved service delivery.

7. Flexible Working Options

- 7.1 There are a number of flexible working options or work patterns that the Board may be able to support and more detail on these options is contained in the Flexible Working Procedures:

- Part-time working (including variable part-time working);
- Term-time;
- Job Share (separate policy and guidance);
- Annualised Hours;
- Compressed Hours;
- Extension of Flexi system;
- Home Working;
- Voluntary Reduced Hours;
- Worksmart.

8. Equality Impact Assessment

- 8.1 This policy and related procedures have been equality impact assessed in line with the Board's obligations to comply with the Equality Act 2010.

9. Monitoring & Review

- 9.1 This policy and related procedures will be monitored and reviewed regularly as it is applied and in line with any legislative changes relating to flexible working.

RENFREWSHIRE VALUATION JOINT BOARD



FLEXIBLE WORKING PROCEDURES

| | |
|-------------------------|-----------------------------|
| Title | Flexible Working Procedures |
| Author | Kate Crawford, Assessor |
| Approved By | Management Team |
| Date of Approval | |
| Reviewer | PAO |
| Review Date | As required |

Review History

| Review No. | Details | Release Date |
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| 1 | Replaces Right to Request Flexible Working | |

1. Purpose

- 1.1 Renfrewshire Valuation Joint Board is committed to adopting new ways of working which assists in the process of modernising service delivery whilst promoting work-life balance for employees
- 1.2 These procedures advise both managers and employees on the process for making flexible working requests.
- 1.3 The Flexible Working Policy and associated Procedures extends to all Board employees covered by Local Government Terms and Conditions.
- 1.4 Only one flexible working request may be made within a 12-month period, regardless of whether or not it is approved or declined. Only in circumstances as defined by the Equality Act 2010 will an employee be able to submit more than one request for flexible working in a 12-month period.
- 1.5 Information on the statutory right to request flexible working is available Appendix 2.

2. Flexible Working Options

- 2.1 There are a number of flexible working options or work patterns that the Board may be able to support largely depending on the job role. The list below is not exhaustive. Employees and their managers may agree that a combination of options may better suit the service and the employee's needs. Regardless of the flexible working option, it is crucial that any changes to contractual working hours, arrangements and amendments to annual leave and public holiday entitlements are recorded and monitored by the line manager and advice or guidance should be sought from the Board's Personnel Practitioner where necessary.
 - 2.1.1 **Part-time working** (including variable part-time working) – reducing the number of contracted hours worked per week. Salary and annual leave will be pro-rated. Variable part-time working may also be an option, where employees can regularly adjust their part-time hours to suit the needs of the service, i.e. increase their normal contracted hours during busy periods. Depending on the work arrangement agreed, annual leave and public holidays will be pro-rated and may be converted into hours rather than days.
 - 2.1.2 **Term-time working** – allows employees to work during the school term-times only. Salary will be pro-rated (which is adjusted to include payment for entitlement to annual leave), and no annual leave is taken during term-time.
 - 2.1.3 **Job Share** – normally allows 2 employees to share the responsibilities, tasks, hours, pay and benefits of one post.

- 2.1.4 **Voluntary Reduced Hours** – this is a voluntary arrangement whereby an employee in agreement with their line manager, reduces the number of hours worked for an agreed period, reverting to their substantive contracted hours at the end of this agreed period.

3. Equality Matters

- 3.1 In order to monitor the effectiveness of the Board's Equality and Diversity Policy, The Board monitors a range of areas where employees may experience discrimination. When submitting a request for flexible working, employees are asked to complete Appendix 10 – Equal Opportunities Monitoring Form. All information you provide will be treated in strict confidence and will only be used for reporting workforce equality statistics as required by the Equality Act 2010.
- 3.2 Managers must ensure at all times that when considering requests for flexible working that they take cognisance of the following points:
- that they avoid direct and indirect discrimination;
 - reasonable adjustments are made to remove barriers for employees with disabilities;
 - requests for changes to hours or work patterns for employees who are associated with a protected characteristic are given due consideration;
 - requests for changes to hours or work patterns for employees who have a religion or belief or lack of religion or belief;
 - requests for changes to hours or work patterns for employees who propose to, have started or have completed the process of gender reassignment.

4. Flexible Working Request Process

- 4.1 A flow chart detailing the process to be followed when dealing with any flexible working request is available in Appendix 1.
- 4.2 **Reaching a decision**
- 4.2.1 When a flexible working request has been considered by the Management Team and a decision reached, the completed form to the Board's Personnel Practitioner. Employees should be informed in writing of the decision to approve or decline their request within 28 days of the manager receiving the application. Where a meeting has taken place with the employee to discuss the application, the employee should be notified in writing of the decision within 14 days of the meeting taking place.
- 4.3 **Request Approved**
- 4.3.1 Where a flexible working request is approved, the Board's Personnel Practitioner will arrange for a variation to contract to be issued and the employee informed of the decision. The employee should also be informed of any changes to their entitlement to annual leave and public holidays as a result of their flexible working arrangement.

4.3.2 Where a temporary arrangement has been approved (minimum 6 months to a maximum of 12 months), a review of the arrangement should be carried out 4 weeks prior to the agreed end date. The Board's Personnel Practitioner should be informed of whether the arrangement is terminating on the agreed date, being extended for a further period, or if the arrangement is to become a permanent change. The employee should be informed of any changes to their entitlement to annual leave and public holidays as a result of their flexible working arrangement.

4.3.3 The Management Team may wish to review all flexible working arrangements periodically due to changes in the needs of the service and changes to employees' individual circumstances.

4.4 Request Declined

4.4.1 A flexible working request may only be declined where there are clear business reasons to do so. These reasons include:

- unreasonable additional costs;
- detrimental effect on the ability to meet customer demand and service requirements;
- inability to reorganise the work amongst the existing employees;
- inability to recruit additional employees;
- detrimental impact on the quality of the service provided;
- detrimental impact on performance;
- planned structural changes; and/or
- insufficiency of work during the periods the employee proposes to work.

4.4.2 Where a request has been declined, the employee should be informed in writing of the decision and their right to appeal. A template letter is available in Appendix 6/2.

4.4.3 Consideration should be given to other flexible working options that they may be able to support if they cannot support the request made by the employee.

4.5 Appealing a decision

4.5.1 If an employee wishes to appeal the decision they must do so by notifying the Assessor and ERO within 14 days of the date on which the notice of the decision was made. The appeal, which must be made in writing and contain the grounds of the appeal, should be made using the appeal form at Appendix 5 – HR/FW/2. All timescales detailed in this process can be varied by mutual consent.

4.5.2 The grounds for appeal include:

- the procedure has not been followed;
- that the business reason for rejecting the request has not been sufficiently explained;
- the reason for refusal was not related to a business reason;
- the manager/service did not fully consider the request; or
- a fact in the explanation of the business reason is incorrect.

- 4.5.3 An appeal hearing must be heard by the Assessor & ERO (or nominated officer) within 14 days of the employee giving notice of appeal. The employee must be sent notice of the Assessor & ERO's (or nominated officer's) decision within 14 days of the date of the meeting.
- 4.5.4 If the appeal is upheld the employee must be given written confirmation within 14 days of the hearing, specifying the agreed changes and the date from which they will take effect. An appeal can be upheld without holding a meeting provided the employee is given written notice, specifying the agreed changes, and the date from which they will take effect.
- 4.5.5 If the appeal is rejected, the Assessor & ERO (or nominated officer) should advise the employee in writing within 14 days of the hearing of the grounds for the decision. This letter must be dated, stating the grounds for the decision in direct response to the employee's grounds for making an appeal, and must explain the grounds for refusal.
- 4.5.6 Where an employee has been unsuccessful at the appeal stage, they will not be able to submit a new flexible working request for 12 months, unless exceptional circumstances apply.
- 4.5.7 This will conclude the appeal process and there is no further right of appeal.

5. Right to Be Accompanied

- 5.1 An employee has the right to be accompanied during the appeal process if they so wish. Representation may be by a trade union representative or fellow worker and the employee must be informed of this right. The employee should also be advised that it is their responsibility to arrange to be accompanied.
- 5.2 It is not reasonable for an employee to be accompanied by an individual whose presence could prejudice the hearing nor is it reasonable for the employee to request to be accompanied by a representative from a remote geographical location if someone suitable and willing is available on site.
- 5.3 The Management Team may, in exceptional circumstances, consider a reasonable request by an employee to be accompanied by someone other than a Trade Union representative or fellow worker, e.g. a support worker for an employee with disabilities.

6. Withdrawn Applications

- 6.1 An employee can withdraw their request at any stage in the process prior to the employee being notified of the decision by the line manager in respect of the flexible working request.

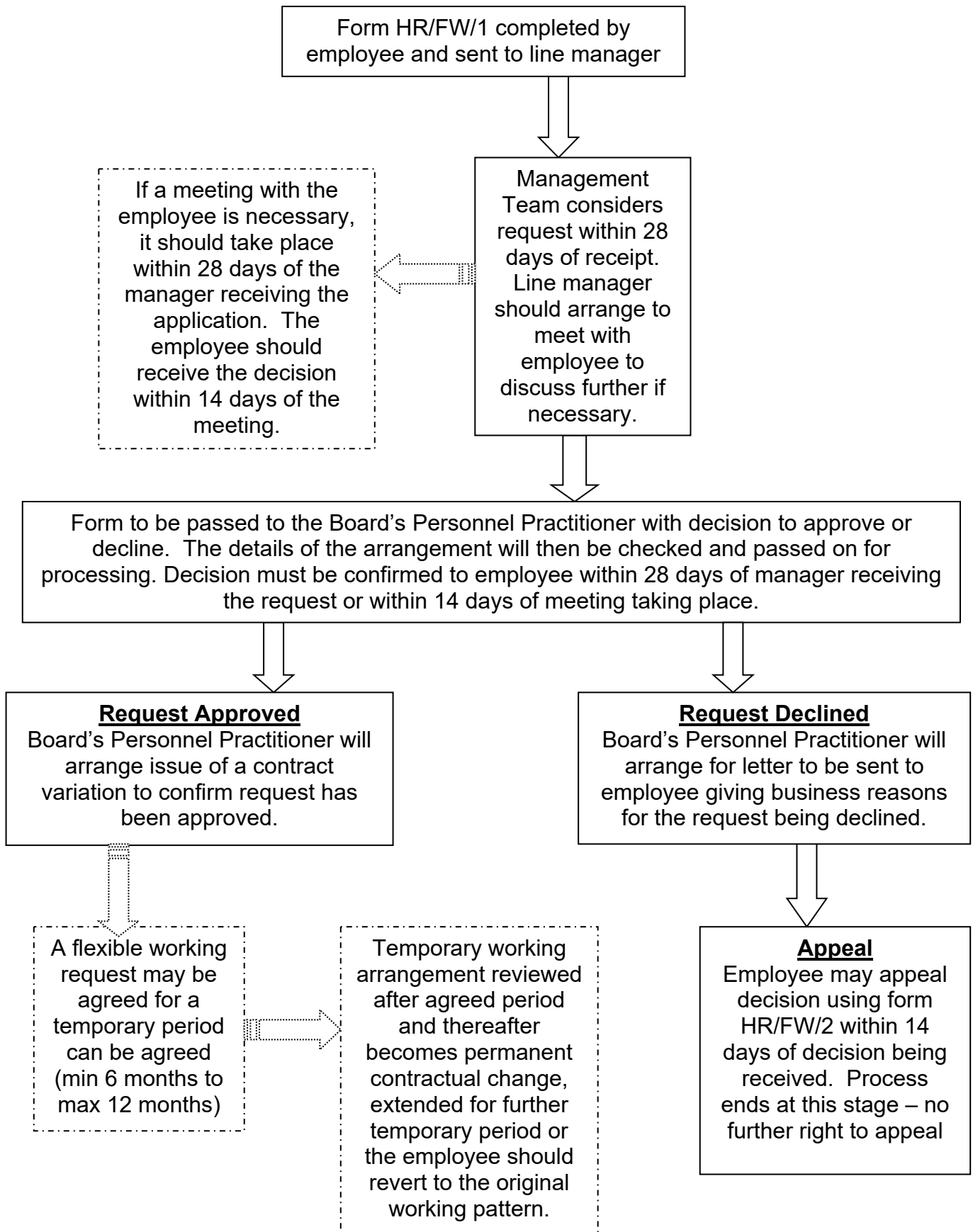
7. Changing Employment

- 7.1 Employees who have been granted a flexible working arrangement must note that these arrangements have been agreed in relation to the role that they held at the time of the arrangement being agreed. Flexible working arrangements are not automatically transferable to another post. It is the employee's responsibility

to advise the chair person of the recruitment panel if they would wish to request to continue with their current flexible working arrangement in a new role.

Appendix 1 – Flexible Working Request Process

The flow chart below shows the flexible working request process:



Appendix 2 - Statutory Right to Request Flexible Working

The statutory right to request flexible working is available to employees:

- with at least 26 weeks continuous service on the date the application is made, and;
- who has not made another statutory request for flexible working during the past 12 months, even if it was for a different caring responsibility.

Carers can request flexible working if they care, or expect to be caring, for either:

- a spouse, partner, civil partner or relative;
- someone who lives at the carer's address.

The statutory definition of "relative" listed now is: "mother, father, adopter, guardian, parent-in-law, step-parent, son, step-son, daughter, step-daughter, daughter-in-law, brother, step-brother, brother-in-law, son-in-law, sister, step-sister, sister-in-law, uncle, aunt or grandparent". It also includes adoptive and step-relationships.

RENFREWSHIRE VALUATION JOINT BOARD**FLEXIBLE WORKING REQUEST****APPLICATION FORM - HR/FW/1****Note to the employee**

This form should be used to make an application for flexible working, to adjust your contracted working pattern or contracted working hours. Please ensure all sections are completed before sending to your line manager for their consideration and complete the Employee Checklist.

Note to the manager

Employees may make an application for flexible working either under the statutory right for caring responsibilities or under their terms and conditions of employment. Managers have 28 days from the day the application is received in which to either respond to the request or arrange a meeting with the employee to discuss their request further, should this be required. If this is required, the manager should respond with their decision within 14 days of the meeting. Acknowledgment of the application and confirmation of the meeting date should be sent to the employee as soon as possible using the template letter HR/FW/Ltr1

1. Personal details

Name:

| | | | |
|-------------------------|--|---------------------------|--|
| Designation: | | Service: | |
| Work location: | | Home Address: | |
| Employee number: | | Work phone Number: | |

2. Basis of Application

I would like to apply to work a flexible working pattern that is different to my current working pattern.

❖ I am applying under statutory rights and I have caring responsibilities:

☐

OR

❖ I have no caring responsibilities and am applying under my terms and conditions of employment

☐

❖ I have not made another request for flexible working during the past 12 months, (even if it was for a different caring responsibility)

☐

❖ I am currently working flexibly - Yes ☐ No ☐

If yes, please detail your current flexible working arrangement.

.....

3a Describe your current working pattern (days/hours/times worked):

| DAY | HOURS WORKED | TIMES WORKED |
|--------------------------------|--------------|--------------|
| Monday | | |
| Tuesday | | |
| Wednesday | | |
| Thursday | | |
| Friday | | |
| Saturday | | |
| Sunday | | |
| Total Current Contracted Hours | | |

3b Describe the working pattern you would like to work in future (days/hours/times worked):

| DAY | HOURS WORKED | TIMES WORKED |
|---------------------------------|--------------|--------------|
| Monday | | |
| Tuesday | | |
| Wednesday | | |
| Thursday | | |
| Friday | | |
| Saturday | | |
| Sunday | | |
| Total Proposed Contracted Hours | | |

2c I would like this working pattern to commence from:

Date:

On a temporary ☐ or permanent ☐ basis.

If temporary, how long would suggest the arrangement is for?

3. Impact of the new working pattern

Please explain how you feel your change in your working hours/pattern will impact the service provided and your colleagues:

4. Accommodating the new working pattern

Please explain how you feel your new working hours/pattern can be accommodated within your service.

Flexible working application form declaration

I confirm that all information I have given on this form is accurate.

Signature:

Date:

Outcome of Flexible Working request

Manager Name:

Designation:

Request Approved:
(please tick appropriate)

Request Declined:

Reason for decision:

Date form checked:

Date new working arrangement to commence:

Date passed to Board's Personnel Practitioner:
(if approved)

Date returned: (if declined)

Sample Letter – Flexible Working Request received.

Dear ***

I write to confirm I have received your flexible working request which I will consider and notify you of my decision by DATE (within 28 days of receipt of application).

*

Yours sincerely

* Optional:

I have arranged a meeting on DATE at TIME at VENUE to discuss your request further.

You may have a colleague or trade union representative to accompany you at the meeting and they may confer with you during the meeting but should not answer questions on your behalf.

I would be grateful if you would confirm your attendance at this meeting as soon as possible.

Yours sincerely

RENFREWSHIRE VALUATION JOINT BOARD**FLEXIBLE WORKING REQUEST****APPEAL FORM - HR/FW/2****Note to the employee**

If your request for flexible working has been refused, you may appeal against the decision. You can use this form to make your appeal. You should set out the grounds on which you are appealing and do so within 14 days of receiving written notice that your request for flexible working has been declined.

Note to the Director/Head of Service/nominated officer

This is a formal appeal made under the flexible working guidelines. You have 14 days following your receipt of this form in which to arrange a meeting with your employee to discuss their appeal.

1. Personal Details**Name:****Designation:****Service:****Work location:****Home address:****Employee number:****Work phone****Reason given by manager for declining flexible working request:****Reason for appealing this decision:**

(please continue on a separate sheet if necessary)

Signed:**Date:**

Please return this completed form to the Assessor & ERO.

Confirmation of Flexible Working request approval – to be sent with variation to contract.

Dear *

Following receipt of your application form (and your meeting on *** with ***), your manager *** has now considered your flexible working request.

I am pleased to confirm that your flexible working request has been approved.

Your new working pattern will be:

New pattern:

Start date of new pattern:

End date (if temporary):

Review date (if arrangement temporary):

Special Conditions (if applicable):

Pro-rata annual leave & public holiday entitlement (if applicable):

You should note that these arrangements have been agreed in relation to the role held at the time of the arrangement being agreed. Flexible working arrangements are not automatically transferable to another post within the Board.

A variation to your contract is enclosed reflecting these changes.

Yours sincerely

Flexible working request declined

Dear **

Following receipt of your application form (and our meeting on **), I have now considered your flexible working request.

I regret to inform you that I am unable to accommodate your request for the following business reasons:

(Manager to choose as appropriate)

- unreasonable additional costs;
- detrimental effect on the ability to meet customer demand and service requirements;
- inability to reorganise the work amongst the existing employees;
- inability to recruit additional employees;
- detrimental impact on the quality of the service provided;
- detrimental impact on performance;
- planned structural changes; and/or
- insufficiency of work during the periods the employee proposes to work.

The grounds apply in the circumstances because:

Other working patterns discussed at the meeting are also inappropriate because:

If you wish to appeal against this decision, you should do so by completing the form HR/FW/2 and returning it to the Assessor & ERO within 14 days of receipt of this letter.

Yours sincerely

Confirmation of Flexible Working request approval following appeal.

Dear *

Following your appeal against the decision to decline your flexible working request, I am pleased to confirm that I have upheld your appeal and your request has been approved.

Your new working pattern will be:

New pattern:

Start date of new pattern:

End date (if temporary):

Review date (if arrangement temporary):

Special Conditions (if applicable):

Pro-rata annual leave & public holiday entitlement (if applicable):

You should note that these arrangements have been agreed in relation to the role held at the time of the arrangement being agreed. Flexible working arrangements are not automatically transferable to another post within the Board.

A variation to your contract will be issued to reflect these changes, but in the mean time I trust you are happy with these arrangements.

Yours sincerely

Flexible working request declined following appeal

Dear **

Following your appeal against the decision to decline your flexible working request, I have now considered your request and the reasons your manager declined the request.

I regret to inform you that your appeal has not been upheld and that I am unable to accommodate your request for the following business reasons:

(Manager to choose as appropriate)

- unreasonable additional costs;
- detrimental effect on the ability to meet customer demand and service requirements;
- inability to reorganise the work amongst the existing employees;
- inability to recruit additional employees;
- detrimental impact on the quality of the service provided;
- detrimental impact on performance;
- planned structural changes; and/or
- insufficiency of work during the periods the employee proposes to work.

The grounds apply in the circumstances because:

Other working patterns discussed at the appeal hearing are also inappropriate because:

This appeal concludes the process and you will not be able to submit a new flexible working request for 12 months unless exceptional circumstances apply.

Yours sincerely

Appendix 7 - Employee Checklist

| Employee Checklist | |
|--------------------------------------------------------------------------------------------------------------------------------|--|
| Check personal details are fully completed | |
| If making a request under statutory right to request, check appropriate section complete on eligibility and reason for request | |
| Check current working pattern details completed | |
| Check details of proposed new working pattern completed | |
| Check all remaining sections completed | |
| Check signed and sent to manager for consideration | |

Appendix 8 - Manager's Checklist – request approved

| Manager's Checklist – if request approved | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Acknowledge receipt of flexible working request from employee | |
| Check form completed in full | |
| Optional – arrange to meet the employee to discuss request further within 28 days of receipt of application | |
| Consider request from employee in line with service requirements and other existing flexible working arrangements | |
| Once decision reached send to Board's Personnel Practitioner to be checked – employee should be informed within 28 days of request being received by the manager, or where a meeting has been arranged within the 28 days, the employee should be informed of the decision within 14 days of the date of the meeting | |
| If request approved, Board's Personnel Practitioner will arrange letter informing the employee of decision and variation to contract | |
| Confirm to the employee any changes to their annual leave and public holiday entitlement | |
| If the request has been for a temporary period, a review meeting should be held with the employee at least 4 weeks prior to the agreed end date to discuss whether the arrangement is terminating or becoming permanent. | |
| Ensure that a suitable recording and monitoring process has been put in place. | |

Appendix 9 - Manager's Checklist – request declined

| Manager's Checklist – if request declined | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Acknowledge receipt of flexible working request from employee | |
| Check form completed in full | |
| Optional – arrange to meet the employee to discuss request further within 28 days of receipt of application | |
| Consider request from employee in line with service requirements and other existing flexible working arrangements | |
| Once decision reached, send to Board's Personnel Practitioner for the details to be checked – employee should be informed within 28 days of request being received by the manager, or where a meeting has been arranged within the 28 days, the employee should be informed of the decision within 14 days of the date of the meeting | |
| If request declined, the employee should be advised in writing of decision and right to appeal within 14 days of receipt of decision | |
| Employee should complete the appeal form and send to the Assessor & ERO within 14 days of receipt of decision | |
| The Assessor & ERO (or nominated officer) should arrange appeal hearing within 14 days of notice of the employees wish to appeal the decision | |
| The Assessor & ERO (or nominated officer) should notify the employee in writing of the appeal hearing decision within 14 days of date of the appeal hearing. The employee should be made aware that there is no further right of appeal. | |

Appendix 10 – Equal Opportunities Monitoring
EQUAL OPPORTUNITIES MONITORING FORM
CONFIDENTIAL



In order to check the effectiveness of the Board's Equality and Diversity Policy, The Board monitors a range of areas where people may experience discrimination. The Board would be pleased if you would complete the form below. The information you give will not be available to people involved in the selection process and will be used for monitoring purposes only. All information will be treated in strict confidence and no names will be shown in any statistics produced.

1. PERSONAL DETAILS

Surname: _____ Forename: _____

Post Title: _____

Service: _____ ☐ full-time ☐ part-time

2. GENDER IDENTITY

How would you describe your gender?

☐ Female ☐ Male ☐ Prefer not to answer

Have you ever identified as a transgender person or trans person?

(for the purpose of this question, 'transgender' is defined as an individual who lives, or wants to live, full-time in the gender opposite to that which they were assigned at birth)

☐ Yes ☐ No ☐ Prefer not to answer

3. MARITAL STATUS

What is your legal marital status?

☐ Single ☐ Married/Civil Partnership ☐ Living with partner ☐ Divorced
☐ Divorced/Separated ☐ Separated ☐ Widowed ☐ Prefer not to answer

4. AGE

What is your date of birth?

Day _____ Month _____ Year _____ ☐ Prefer not to answer

5. CARING RESPONSIBILITIES

Do you have caring responsibilities? *(Please tick all that apply)*

☐ Yes (children under 18) ☐ Yes (other) ☐ No ☐ Prefer not to answer

6. RELIGION OR BELIEF

What is your religion or belief?

☐ Buddhist ☐ Church of Scotland ☐ Hindu ☐ Humanist ☐ Jewish
☐ Muslim ☐ None ☐ Other Christian ☐ Sikh ☐ Pagan
☐ Roman Catholic ☐ Prefer not to answer ☐ Other religion or belief, please specify _____

7. SEXUAL ORIENTATION

What is your sexual orientation?

☐ Bisexual ☐ Gay ☐ Heterosexual/Straight ☐ Lesbian ☐ Prefer not to answer

8. NATIONAL IDENTITY

What is your national identity?

☐ Scottish ☐ English ☐ Welsh ☐ Northern Irish ☐ British ☐
☐ Prefer not to answer Other, please specify _____

9. ETHNIC GROUP

What is your ethnic group? For this question, you should choose one section from A to G to indicate your ethnic group. Choose H if you prefer to not answer this question.

A. White

- ☐ Scottish
☐ Other British
☐ Irish
☐ Gypsy/Traveller
☐ Eastern European (for example Polish)
☐ Other white ethnic group, please specify _____

B. Mixed or Multiple Ethnic Groups

- ☐ Any mixed or multiple ethnic groups, please specify _____

C. Asian, Asian Scottish or Asian British

- ☐ Pakistani, Pakistani Scottish or Pakistani British
☐ Indian, Indian Scottish or Indian British
☐ Bangladeshi, Bangladeshi Scottish or Bangladeshi British
☐ Chinese, Chinese Scottish or Chinese British
☐ Other, please specify _____

D. African

- ☐ African, African Scottish or African British
☐ Other, please specify _____

E. Caribbean or Black

- ☐ Caribbean, Caribbean Scottish or Caribbean British
☐ Black, Black Scottish or Black British
☐ Other, please specify _____

F. Arab

- ☐ Arab, Arab Scottish, Arab British
☐ Other, please specify _____

G. Other

- ☐ Other, please specify _____

H. Prefer not to answer

- ☐ Prefer not to answer

10. DISABILITY

Under the terms of the Equality Act 2010, a disability is defined as a physical or mental impairment, which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day tasks.

Do you consider that you have a disability?

- ☐ Yes ☐ No ☐ Prefer not to answer

If yes to the above question, please state the type of impairment which applies to you. You may indicate more than one. If none of the categories apply, please mark 'Other' and specify the type of impairment.

- ☐ Learning disability (*such as Down's Syndrome or dyslexia*) or cognitive impairment (*such as autism or head injury*) ☐ Physical Impairment (*such as difficulty using your arms or mobility issues which means using a wheelchair or crutches*)
☐ Long standing illness or health condition (*such as cancer, HIV, diabetes, chronic heart disease or epilepsy*) ☐ Sensory Impairment (*such as being blind/ having serious visual impairment, or being deaf/ having a serious hearing impairment*)
☐ Mental health condition (*such as depression or schizophrenia*)
☐ Other (*such as disfigurement*) please specify _____ ☐ Prefer not to answer

If you have a disability and you require assistance to enable you to attend for, and participate fully in the interview process (for example ramp access, large print material, a signer), please provide details in the application form)

11. PREGNANCY/MATERNITY LEAVE

Are you currently pregnant or on maternity leave?

- ☐ Pregnant ☐ On maternity leave ☐ Neither ☐ Prefer not to answer ☐

12. DATA PROTECTION ACT

In terms of the Data Protection Act 1998, I consent to the information which I have provided being processed to monitor the effectiveness of the Board's Equality and Diversity Policy. I understand that this information will be held on manual or electronic records.

Signed.....

Date.....