



UNIVERSITY OF
CAMBRIDGE

Hybrid Working Policy Guidance

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What this guidance covers

1. This guidance supports the University's Hybrid Working Policy.
2. The purpose of the guidance is to **ensure a consistent and fair approach to decisions around hybrid working and to support institutions, line managers and staff in identifying and agreeing hybrid working arrangements**. It explains the:
 - a) procedure for agreeing hybrid working arrangements;
 - b) health and safety assessment for the remote working environment;
 - c) reasonable adjustments that may need to be taken into consideration;
 - d) conditions for working solely from a remote working environment; and
 - e) procedure for managing disagreements over arrangements.
3. **Additional resources**, such as sample questions, are included in the annexes to assist staff with some of the steps in the processes; these are indicated where relevant.
4. **Definitions** of the terms used in the Policy and this guidance are included for reference on page 4.
5. This guidance is **not contractual** and will be amended from time to time as necessary.

Hybrid working principles

6. **The University's Hybrid Working Policy aims to enable as many staff as possible to work in a hybrid way if they so wish.**
7. **Consideration should be given to the possibility of occasional remote working** even if only a small number of tasks in an individual's role can be performed in this way. **However, it is recognised that some roles will have tasks that can only be performed on the University's premises.**
8. **Institutions are best placed to identify the most appropriate level of hybrid working for their staff in terms of the split between working on University premises and working remotely.**
9. **There is no expectation that staff must work in a hybrid way and** where roles do have tasks that can be performed in a remote working environment, **each individual has a choice as to whether or not they would like to work in this way.**
10. **It is envisaged that the majority of staff who are able to work this way and wish to do so will regularly split their time between the University and their remote working location.** Only in certain circumstances are staff able to work solely from a remote working environment within the UK under this Policy.
11. Where eligible, individuals are still able to exercise their statutory right to request flexible working, which may include other forms of working arrangements outside the scope of this Policy (such as amended working hours or job-sharing).

Definitions

Hybrid working. A type of flexible working that focusses on the location in which work is undertaken, with some work being undertaken in the workplace and some work being undertaken in an agreed remote working environment.

University workspace. The office, laboratory, desk and/or other such space in/at which the individual normally works in their principal place of work (as stated on their Schedule of Employment). This does not include any rooms or other spaces provided by the Colleges in connection with fellowship or supervisory responsibilities.

Remote working environment. The place where remote working is undertaken. Under this Policy, the remote working environment will be based within the UK. It is anticipated that this will normally be an individual's home but could also include College rooms and spaces or a non-University flexible workspace. The process for agreeing hybrid working arrangements, including the normal remote working environment, is set out in this guidance.

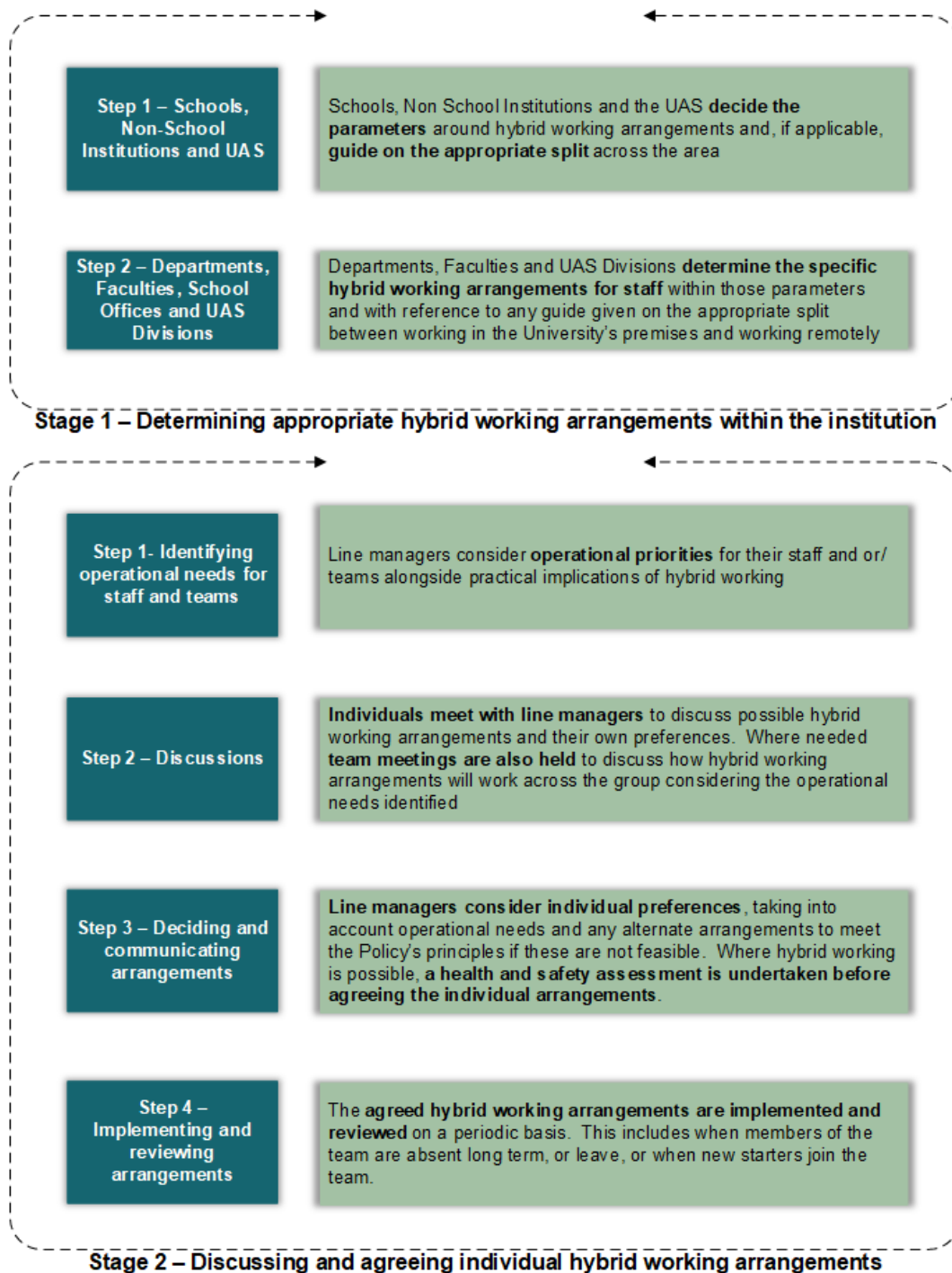
Tasks. This refers to the components of an individual's role, which determine their ability to work in a hybrid way for the purpose of this Policy.

Line manager. For the purpose of the Policy and this guidance, "line manager" includes not only individuals who are designated as such but those in equivalent roles with responsibility for the supervision or work of another colleague, for example a Departmental Administrator, Principal Investigator or Head of Institution.

Staff. For the purpose of the Policy, "staff" includes all University employees (including academic staff) and workers.

Agreeing hybrid working arrangements

12. The process for agreeing hybrid working aims to provide a consistent approach to the decision-making process across the University. It also aims to provide flexibility for institutions to identify and implement the level of hybrid working that best suits their needs. It is based directly on the return to the workplace process set out in the guidance produced for institutions, line managers and staff in 2021 and which was updated in 2022.
13. At the time of the Hybrid Working Policy's launch, institutions may be at a variety of stages in confirming hybrid working arrangements. Where arrangements are currently being put in place or have been confirmed already, there is no requirement to repeat any parts of the process.
14. The following diagram sets out an overview of the whole process for institutions, line managers and staff.



Stage 1. Determining appropriate hybrid working arrangements within the institution

15. The Policy states that individual institutions are best placed to identify the appropriate level of hybrid working for their staff rather than the University. Accordingly, the first stage in the process of agreeing hybrid working is for institutions to determine the appropriate split between working on University premises and working remotely for their area.
16. Depending on the nature of the Institution, this stage may involve:

Step 1 – Schools, Non-School Institutions and the Unified Administrative Service (UAS)

decide the parameters around hybrid working arrangements and, if applicable, guide on the appropriate split across the area; then

Step 2 – Departments, Faculties and UAS Divisions determine the specific hybrid working arrangements for staff within those parameters and with reference to any guide given on the appropriate split between working in the University's premises and working remotely.

17. Smaller Non-School Institutions may wish to combine the individual steps in this stage. In this situation, senior leaders in discussion with the appropriate committee or leadership team should determine the specific hybrid working arrangements for the area (step 2 above) following consideration of paragraphs 21 and 22.

Step 1. Schools, Non-School Institutions and UAS

18. This step is undertaken by Heads of School, Heads of Non-School Institutions, and the Registry in the case of the UAS, in discussion with the appropriate committee or leadership team.
19. When deciding the parameters around hybrid working arrangements, it is recommended that senior leaders consider the following:
 - the area's objectives and culture and what proportion of time spent in the University workspace may support these most effectively;
 - the types of activities that must take place within the University workspace, those that may benefit from taking place within the University workspace, and those that do not need staff to be physically present;
 - the area's recruitment and retention of staff and the possible impact of hybrid working to address any problems in these fields;
 - the views of Heads of Institution / Heads of Division and staff within the area on hybrid working, including any possible benefits and detriments, and the current level of hybrid working taking place across the area if applicable;
 - Any specific and/or general exceptions that may need to be accommodated in the arrangements implemented by the departments, faculties and divisions (for example, ensuring staff are onsite for the induction of new colleagues, or in-person attendance at particular events and meetings).
20. Senior leaders may find it helpful to approach colleagues outside of their area to discuss any experiences of implementing their own hybrid working arrangements. This can help to ensure a consistent approach is applied across the University in comparable institutions or fields.
21. If guiding on the appropriate split, Schools, the UAS and large Non-School Institutions (where individual departments will be tasked with undertaking step 2 of this stage) may find it helpful to consider the way this is expressed. For example,
 - **a minimum number of days each week** that staff should work in their University workspace (for example, 2 days a week); or
 - **a proportion of working hours** (for example, a minimum of 40% of contracted hours each fortnight or month). This option may allow more autonomy and flexibility both for

staff who have peaks and troughs in their need to be onsite and for any colleagues who support them.

To meet the Policy's provision that the majority of staff who are able to work this way will regularly split their time between the University and their remote working location, **it is recommended that the unit of time over which the split is expressed is no longer than a month.**

22. Senior leaders may also wish to consider advising departmental, faculty or divisional Heads that they may decrease the proportion of time spent working from a remote working environment as appropriate to their local area, but not increase it beyond the guide set. However, senior leaders may prefer to delegate the decision concerning the appropriate split to departmental, faculty or divisional Heads, with a clear set of parameters to assist them in making fair and consistent decisions.
23. Once the parameters around hybrid working arrangements and the guide on the appropriate split have been decided, this information should be clearly communicated to departments, faculties and divisions so they can undertake step 2.

Step 2. Departments, Faculties, School Offices and UAS Divisions

24. This step is undertaken by the Heads of Institutions, Heads of Division and departmental heads in larger Non-School Institutions in discussion with the appropriate committee or management team.
25. The purpose of this step is to determine the specific hybrid working arrangements for the area, taking into account the parameters around hybrid working arrangements and the guide on the appropriate split (including the possibility of decreasing the proportion of time spent working remotely) where established in the previous step.
26. This involves:
 - **deciding the split** between working in the University's premises and working remotely, which will become the general level of hybrid working available for the area's staff with tasks that are suitable to be undertaken from a remote working environment.
 - **any additional parameters** specific to the area should also identified, along with
 - any **expectations around the implementation** of hybrid working in the area, and
 - **supporting steps that need to be taken** (such as providing IT equipment in line with the provisions of the Hybrid Working Policy).
27. When considering the appropriate split, it may be helpful to consider the way it is expressed; please see paragraph 21 for further guidance on this point.
28. In undertaking this step, it is recommended that the leaders involved in these decisions take the following aspects into account:
 - the area's objectives and culture and what proportion of time spent in the University workspace may support these most effectively, including any views of groups supported by the area's staff as appropriate;
 - the types of activities that must take place within the University workspace, those that may benefit from taking place within the University workspace, and those that do not need staff to be physically present;

- the area's recruitment and retention of staff and the possible impact of hybrid working to any address any problems in these fields;
 - the views of managers and staff within the area on hybrid working, including any possible benefits and detriments; and
 - any additional exceptions to those identified in the parameters that need to be included in the specific working arrangements in the area (for example, in-person attendance for particular departmental events and meetings).
29. As with step 1, those involved in this step may find it helpful to approach colleagues outside of their area to discuss any experiences of implementing their own hybrid working arrangements. This can help to ensure a consistent approach is applied across the University in comparable institutions or fields.
30. Once the specific hybrid working arrangements have been agreed by the department, faculty or division, this should be communicated to managers along with the details of any exceptions identified and expectations for implementation.

Stage 2. Discussing and agreeing individual hybrid working arrangements

31. Once Stage 1 has been completed, the process moves to agreeing individuals' hybrid working arrangements. This stage is made up of four steps:

Step 1 – Line managers¹ consider the operational needs for their staff and/or teams alongside the practical implications of hybrid working.

Step 2 – Individuals meet with their line managers to discuss possible hybrid working arrangements and their own preferences. Where needed, team meetings are also held to discuss how hybrid working arrangements will work across the group considering the operational needs identified.

Step 3 – Line managers consider individual preferences, taking into account operational needs and any alternate arrangements to meet the Policy's principles if these are not feasible. Where hybrid working is possible, a health and safety assessment is undertaken before agreeing the individual arrangements.

Step 4 – The agreed hybrid working arrangements are implemented and reviewed on a periodic basis. This includes when members of the team are absent long term, or leave, or when new starters join the team.

Step 1. Identifying operational needs for staff and teams

32. Once informed of the specific hybrid working arrangements for the area, line managers should consider the operational needs arising from the teaching, research, technical and/or administrative work undertaken by the staff for whom they are responsible. Aspects such as the following may be helpful to consider:

¹ In line with the definitions in the Policy, "line manager" includes not only individuals who are designated as such but those in equivalent roles with responsibility for the supervision or work of another colleague, for example a Departmental Administrator, Principal Investigator or Head of Institution.

- the nature of the work produced or delivered by their staff or team(s);
- the range of tasks involved;
- the needs of any staff, students or other groups and individuals they support; and
- the availability of staff and other resources to support hybrid working.

This should determine, in general, what activities and services can be delivered remotely and what services must be undertaken on University premises.

33. Line managers may form an opinion at this stage about whether or not hybrid working can be adopted – either *fully or partly* in line with the specific hybrid working arrangements, and *for all, some or none* of their staff and/or team(s). However, no decisions should be made until there has been the opportunity to discuss the operational needs with their staff and/or team(s) and they in turn have been able to feedback on these needs as well as express their own preferences around hybrid working (see step 2).
34. A list of questions is included in Annex A to help line managers consider and identify operational priorities as part of this step.

Step 2. Discussions

35. Once line managers have had the opportunity to consider and identify operational needs, they should meet with their staff and/or team(s) to discuss these needs and explore individual preferences around hybrid working. The purpose of these discussions is to identify if hybrid working can be offered to their staff and/or teams – either fully or partly – in line with the specific hybrid working arrangements communicated by the department, faculty or division.

Team meetings

36. It is recommended that any team meetings are undertaken first, and that they are used to explain and discuss:
 - the split approved as part of the institutional decision on hybrid working arrangements;
 - any associated parameters that need to be considered when deciding individual arrangements;
 - the operational needs identified to understand the context against which decisions will be made;
 - how hybrid working may impact the team and how to accommodate this; and
 - alternate ways of undertaking tasks, if the nature of the operational needs means that hybrid working is unlikely for some or all of the team.
37. Depending on their complexity, line managers may need to meet with the team more than once to discuss these topics. It is important that all team members can participate in discussions about how the team will work where hybrid working is possible.
38. Line managers are also encouraged to consider their own hybrid working arrangements to ensure they continue to support on-site team members. For example, where a team needs to regularly attend onsite to provide an in-person service, it would be appropriate for that team's line manager to be onsite regularly as well, even if a larger number of their tasks can be delivered from a remote working environment.

39. Guide questions to prompt discussion in team meetings are included in Annex A. Records of any discussions should be kept for reference.

Individual meetings

40. Once team meetings have taken place, or in the situation where team meetings are not required, the focus should move to discussions with individual staff to explore whether they would like to work in a hybrid way.
41. In preparing for these discussions, staff members should consider:
- their own preference about hybrid working;
 - which of their tasks may be suitable to be undertaken at home; and
 - if they have a suitable remote working environment.
42. There is no expectation that staff must work in a hybrid way. If staff express a preference for working from University premises, an appropriate dedicated workspace should be made available where needed and where possible.
43. If individuals do express a preference for hybrid working, the tasks in their roles should be discussed to identify those that can be performed effectively through hybrid working, even if only on an occasional basis. The Policy encourages a common-sense approach and a non-exhaustive list is included in Annex B to help identify what tasks are likely to be suitable. Both line managers and individuals should be involved in identifying which tasks may be suitable for undertaking from a remote working environment.
44. If suitable tasks are identified, the location and suitability of **the proposed remote working environment will need to be assessed before agreement can be given**. This is to ensure that it is appropriate for the level of hybrid working and types of tasks being undertaken. A reliable internet connection should also be available. The opportunity to rectify an inadequate remote working environment should be provided before a final decision is made in step 3. Full details of the assessment process are provided in the [Health and Safety Assessment](#).
45. If staff do not have access to a suitable remote working environment but are able otherwise to work remotely, consideration could be given to working in a hybrid way *within* the University. For example, staff could agree certain times each week to work from a flexible working space within the University on activities that would benefit from an environment with less interruption. This may allow staff to still derive some of the benefits of working associated with hybrid working. Alternatively, if staff have a suitable remote space in which to work but do not have suitable furniture, they may wish to search for the furniture needed through the University's [Warp-It service](#).
46. It may be possible to agree the arrangements within the meeting, subject to the health and safety assessment of the individual's remote working environment. In this situation, the hybrid working arrangements should be confirmed subject to the health and safety assessment in an email after the meeting and implemented once the assessment is successfully completed (see paragraph 52 for further details on what to include in the email).
47. Any reasonable adjustments must also be taken into account, as agreed adjustments are likely to take precedence (see [Reasonable adjustments](#) for more information).
48. Guide questions to support the individual meetings are included in Annex A. Records of any discussions should be kept for reference.

Step 3. Deciding and communicating individual hybrid working arrangements

49. Once discussions have taken place, line managers need to decide and communicate the individual hybrid working arrangements for their staff.
50. When deciding whether an individual's preferences can be accommodated in full or in part, the following information should be taken into account:
 - The operational needs identified in step 1 and any suggestions for alternate ways of undertaking tasks as a group arising from team meetings in step 2 that ensure that these needs continue to be met.
 - Which tasks might be undertaken remotely and any suggestions for alternate ways of undertaking tasks from individual meetings in step 2 that might reasonably enable hybrid working where possible.
 - The results of the health and safety assessment, and any rectifications that are necessary.
 - Any applicable reasonable adjustments, either pre-existing or identified through the discussions and confirmed by professional guidance, such as Occupational Health.
51. If hybrid working cannot be accommodated, the reasons should reflect one of the eight reasons for refusal stated in the Flexible Working Policy. For example:
 - where hybrid working will negatively impact the cohesion and culture of a team, this is likely to lead to a detrimental impact on the quality of their work.
 - where hybrid working will mean that an individual with responsibility for site-based tasks would not be able to undertake them, this will have a detrimental impact on their performance.
 - where hybrid working will require the duplication of specialist equipment only available on the University's premises, this might result in an unreasonable burden of additional costs.

The full list of reasons is as follows:

- the burden of additional costs.
 - the detrimental effect on the ability to meet customer demand (for example, the ability to meet student demand).
 - the inability to reorganise work amongst existing staff.
 - the inability to recruit additional staff.
 - the detrimental impact on quality.
 - the detrimental impact on performance.
 - the insufficiency of work during the periods that the staff member proposes to work.
 - planned structural changes.
52. Once the decision has been made, this should be communicated to the individual personally and agreed. It is recommended that the agreed arrangements are also confirmed in an email, including the date from which any hybrid working arrangements will apply. It is important to remind staff that this is not a contractual arrangement and may be amended from time to time, as necessary in light of any changes in legislation or operation requirements. Any flexibility in attendance, in line with the provisions of section 6.5 of the Policy, should also be mentioned. Template communications are available on the HR website.
 53. Should the individual disagree with the decision, the process set out in [Managing Disagreements](#) should be followed.

54. It is also recommended that, where relevant, a team meeting is organised to inform the whole team of the arrangements. This will be an opportunity for the team to ask questions and agree any practical arrangements to support the implementation of the new arrangements, such as which days colleagues will be in the University workspace.
55. Line managers may find it helpful to approach colleagues outside of their area to discuss any experiences of implementing their own hybrid working arrangements prior to Step 4. This can also help to ensure a consistent approach is applied across comparable teams or roles.

Step 4. Implementing and reviewing individual hybrid working arrangements

56. Once decisions have been communicated, line managers should:
 - Follow up on any practical arrangements required to support the agreed hybrid working arrangements (such as organising any necessary core IT equipment) and keep team members updated on the progress of these actions.
 - Agree contactable hours when working remotely, where this is required in line with section 7.3 of the Policy.
 - Raise any outstanding queries with the HR Business Partnering Team, Occupational Health, or Safety Offices as required.
 - Confirm the timeframe in which to review the arrangements, both with individuals and/or team(s) as appropriate. Line managers and individuals should be prepared to change and adapt arrangements if necessary; it may be helpful to add an agenda item to any appropriate regular meeting to identify improvements or amendments to the arrangements after implementation.
57. Information and training to support both staff and line managers when implementing the practical aspects of managing hybrid teams are available on the University's [dedicated information pages](#) on effective hybrid working.
58. Staff should ensure their line manager and colleagues are aware of their working location on a day to day basis, in particular to ensure the continuation of safe systems around lone working. For those areas where some staff members continue to work entirely or predominantly in the University workspace, line managers should ensure that they are continuing to use safe systems around lone working at the University.
59. There should be regular contact between line managers and any staff members who are working in a remote working environment. Individuals should be given regular opportunities to discuss any issues or concerns relating to hybrid working arrangements, particularly when starting or after amending an arrangement.
60. Hybrid working may not work for everyone all of the time and arrangements should be regularly reviewed between individuals and their line managers. Arrangements may also need to be reviewed when a member of the team is absent long term, or leaves, or a new starter joins the team. The University reserves the right to amend, suspend or end an individual working agreement and the individual is also entitled to request that the arrangement is amended, suspended or ended. Further details are set out in sections 6.10 through to 6.13 of the Hybrid Working Policy.

Health and Safety Assessment

61. Staff wishing to work in a hybrid way are responsible for providing a suitable remote working environment, and agreement of individual arrangements is subject to a successful health and safety assessment of that environment. This is to ensure that it is suitable for the level of hybrid working and types of tasks that will be undertaken. The University operates a self-assessment approach to this process.

Requirements

62. The remote working environment should be:
- safe and secure;
 - adequate in terms of space, lighting, layout and conditions; and
 - appropriate to the nature and frequency of the tasks being undertaken.
63. The Health and Safety Executive states that individuals working from a home environment should be able to achieve a comfortable and sustainable posture while working with display screen equipment. The risk assessment should help decide what is needed for each individual's situation and circumstances.
64. As a minimum, individuals should have:
- a chair suitable for the nature and frequency of the tasks being undertaken;
 - a work desk or appropriate work surface; and
 - a separate monitor or laptop stand.

Further details are set out in Appendix 2 of the University's Display Screen Equipment Policy ([HSD005P](#)).

65. As a standard practice, furniture will not be provided for hybrid workers unless part of reasonable adjustments to support those with disabilities and long-term health conditions (see Reasonable Adjustments). However, Institutions may be able to provide furniture if resources allow; alternatively, individuals may be able to source furniture through the University's [Warp-It](#) service, to be transferred to their area for use in their remote working environment. A set of core IT equipment will be provided for use both in the University workspace and the remote working environment, in line with the provisions of section 8.1 of the Policy.

Process

66. Before undertaking the assessment, individuals should read the leaflets provided by the University on working safely with display screen equipment, both the **general guidance** ([HSD116P](#)) and that specifically for **laptops** ([HSD161P](#)). Further information is also available in the University's Display Screen Equipment Policy ([HSD005P](#)).

67. The individual should then complete the checklist in the [DSE User Workstation Assessment Checklist form](#) in their proposed remote working environment.²
68. Once the assessment is undertaken, any risks identified should be reduced so far as is reasonably practicable. A 'no' answer to any of the questions in the Checklist form relating to the display screen equipment is likely to indicate poor compliance with the minimum standards. Line managers should confirm with the individual that any rectifications have been completed before confirming the hybrid working arrangements.
69. The assessment should be reviewed on a regular basis to make sure that the remote working environment remains safe and healthy, as advised by the University's Display Screen Equipment Policy.³ The assessment should be kept in the individual's personnel file.

Reasonable adjustments

What are reasonable adjustments?

70. Where the Policy refers to reasonable adjustments, it is referring to the **duty on employers under the Equality Act 2010**. A reasonable adjustment is a change made by an employer to **remove or reduce a disadvantage related to a staff member's or job applicant's disability**.
71. The University must make reasonable adjustments for employees and workers, contractors and self-employed people hired to personally do the work, and job applicants when:
 - we know, or could reasonably be expected to know, an individual is disabled;
 - a disabled staff member or job applicant asks for adjustments;
 - an individual who is disabled is having difficulty with any part of their job; and
 - an individual's disability directly or indirectly causes problems with attendance.
72. The University must also:
 - make reasonable adjustments for anything linked to an individual's disability, such as allowing assistance dogs in the workplace; and
 - make sure others do what is needed for a reasonable adjustment to work in practice, such as ensuring colleagues present information in an accessible format.

What to take into account when agreeing hybrid working

73. In the Hybrid Working Policy, **reasonable adjustments take precedence** where there is any conflict with the Policy's terms. There are some explicit examples in the Policy where this might happen, depending upon the specific circumstances and medical advice received, such as:

² A new, online assessment tool is being procured by the Safety Office to replace this manual assessment checklist. Once the new tool is launched, the information in this guidance will be updated accordingly.

³ This currently states that the assessment should be undertaken every two years in the first instance by the individual or if (a) there are major changes made to equipment, furniture or software (b) workstations are relocated (c) there is a change in workload or tasks (d) the health of the user changes (e) there is reason to believe it is no longer valid.

- allowing an individual to work up to **100% of the time** from a remote working environment;
 - duplicating **IT equipment and / or work furniture** where needed for the remote working environment;
 - ensuring that staff are able to take any specific **rest breaks** agreed as reasonable adjustments when working remotely.
74. There may be other reasonable adjustments not specifically mentioned in the Policy but that **need to be taken into consideration** when agreeing hybrid working arrangements, such as to the way work is undertaken, delivered or communicated.
75. Reasonable adjustments in connection with hybrid working may not just apply to work done in the remote working environment. Line managers may need to consider reasonable adjustments if changes are made to the workplace in response to implementing hybrid working, such as allocating a dedicated desk where hot desking is introduced for hybrid staff, or allowing priority booking on an accessible desk. Allowing the staff member flexible working hours so they can avoid peak travel times is another example of a reasonable adjustment that may enable an individual to attend the office.
76. What is reasonable will depend on each individual and their situation. A line manager must consider carefully if the adjustment:
- will remove or reduce the disadvantage;
 - is practical to make;
 - is affordable;
 - could harm the health and safety of others.
77. There is no requirement to change the basic nature of the job and a line manager does not have to make adjustments that are unreasonable. However, they should still try to find other ways to support the disabled person and this could include making other adjustments that are reasonable.
78. Each institution within the University is responsible for paying for any reasonable adjustments for its staff connected to hybrid working. However, many adjustments will be simple and affordable. Financial support towards the costs of reasonable adjustments may also be available from Access to Work. This is a government scheme that can help pay for reasonable adjustments for employees with a physical or mental health condition or disability to get or stay in work. Further details are available on the University's Access to Work [webpage](#).
79. More information about reasonable adjustments is available in the University's [Sickness Absence Guidance](#), including information about making a referral to [Occupational Health](#).

Working solely from a remote working environment within the UK

80. The University's identity and culture are shaped by the benefits of staff being physically present at work. Some of these benefits cannot be replicated remotely, whether it is the special nature of our student experience or the innovation that arises from casual conversation with colleagues.

81. As a consequence, individuals are only able to work entirely from a remote working environment under the Hybrid Working Policy in limited circumstances. As a minimum, this should be restricted to roles where:
 - a. there is a proven shortage of suitably experienced candidates; and
 - b. the appointment is for a fixed-term duration of 12 months or less and is highly unlikely to be extended or made open-ended.
82. Proven shortages under (a) can be evidenced not only by unsuccessful attempts to directly recruit but also by reputable external data, such as sector reports citing shortages or data from specialist recruitment firms.
83. If the appointment does not cease after 12 months as stated under (b), individuals engaged on this temporary arrangement will be expected to apply under the University's Flexible Working Policy should they wish for it to be considered on a longer-term basis.
84. Similarly, if there is a business case to support an individual working this way on a permanent basis and this arrangement is mutually agreed, this should also be managed under the terms of the University's Flexible Working Policy. For example, this type of arrangement may be appropriate for an open-ended role that immediately requires a specialist skill set not widely available (and which necessitates recruitment from the national labour market as consequence) and whose tasks do not need to be delivered from University premises.
85. The arrangement to work entirely from a remote working environment within the UK should also be extended to individuals where professional guidance has indicated that it would be beneficial as a reasonable adjustment to accommodate a disability or long-term, chronic health condition. In these cases, the arrangement will not be time-limited.
86. This option should not be used for roles with tasks that must be undertaken within the University workspace.
87. Working solely from a remote working environment under this Policy is restricted to environments within the UK. The University's International Working Policy (previously called the Global Mobility Policy) and its associated guidance should be consulted for temporary and permanent working arrangements outside of the UK.

Managing disagreements

88. In the situation where an individual disagrees with a decision concerning hybrid working arrangements, attempts should be made where possible to resolve the disagreement informally in the first instance. Both parties are encouraged to participate in this process in an open and collaborative way to try to resolve the disagreement amicably.
89. An informal meeting should be arranged between the staff member and the line manager to discuss the reasons behind the line manager's decision and the nature of the staff member's disagreement with that decision. The discussion should also focus on identifying and agree any suitable alternate arrangements if feasible.
90. When preparing for the meeting it may be helpful to undertake or consider the following as appropriate:

Line manager

- a. Review their decision to ensure that it is consistent with one or more of the eight reasons for refusal listed in paragraph 51.
- b. Check if the decision is consistent with the approach towards others in similar roles within the department, faculty or division and, if not, note the factors that have led to a different approach.
- c. Check if the decision is consistent with the approach in comparable departments, faculties or divisions within the wider School or Non-School Institution and, if not, note the factors led to a different approach.

Staff member

- d. Ensure familiarity with the operational needs of the team and the institutional decision around the general level of hybrid working to understand the factors that the line manager has considered in reaching the decision.
- e. Identify the constructive points that they would like to make during the meeting, including any evidence that may be useful to reference in support, and discuss these points beforehand with a colleague or trade union representative if needed.

Both parties

- f. Consider if there are any alternative arrangements arising from the review of the decision that may provide a similar or partial benefit whilst remaining compatible with the basic nature of the staff member's role and the tasks they must undertake.
- g. Seek advice or guidance on the process as needed from the person responsible for HR in their area or their local HR team, or their HR Business Partnering Team.

91. During the meeting, the individual and line manager should:

- a. Discuss the reasons for the decision against the operational needs of the team and the institutional decision around the general level of hybrid working as applicable. This should also reference the reason(s) identified under paragraph 51.
- b. Explore and understand the reasons behind why the individual is disagreeing with the decision. This may help to identify alternatives offering all or some of the benefit sought from hybrid working. For example, if:
 - travel costs are a factor, could a different format be applied to the working arrangement that is beneficial for the individual and is still consistent with the application of the institutional decision, for example one week in the workplace and the following week working from home?
 - health-related issues are the reason, it may be appropriate to seek guidance from Occupational Health and pause the process until their guidance can be reviewed and considered against the decision as appropriate.
 - a lack of a suitable working environment is the issue, consider reviewing the individual's health and safety assessment, sourcing additional furniture using the University's [Warp-it](#) service, and/or considering other locations for hybrid working within the University.

- c. Discuss any further ideas that could provide a more suitable alternate arrangement that can be accommodated.
- d. If appropriate, consider a short-term trial of the preferred or alternate arrangement, noting any criteria that would be used to assess its success. If considering this option, make sure to agree practical arrangements around it such as the length of the trial and when a review of and final decision about the arrangements will be undertaken.

92. After the meeting, the line manager should consider if:

- a. there is a case for the preferred arrangement to be reconsidered, or
- b. an alternative arrangement can be accommodated, or
- c. no change can be made to the original decision.

The staff member should then be informed accordingly. If a trial arrangement is proposed as part of the decision, they should be made aware of the conditions around the success of the trial (see 92d). A record of the meeting and any decisions arising from it should be kept for reference.

93. Should the staff member continue to dispute the decision, eligible staff members may wish to consider submitting their request formally as a flexible working request under the provisions of the University's [Flexible Working Policy](#). An appeal process is also available under this policy. Where the individual is requesting a higher proportion of time working from their remote working environment than is agreed by the department, faculty or institution, or wishes to combine it with another form of flexible working, such as a change in working hours, a request should be submitted under the Flexible Working Policy rather than managed under the Hybrid Working Policy.

Annex A. Additional Stage 2 resources

Step 1 - Suggested questions for managers considering operational needs

Reliance on University facilities

- What regular tasks do you anticipate can be completed remotely and what must be undertaken in the University workspace?

Service delivery/ student and customer support

- Does your team need to cover core hours to provide a service to students, staff or visitors?
- Does that service need to be delivered in person, or is it possible to deliver some or all of it remotely without a deterioration in the quality of the service?
- Do you need a certain number of staff to be in the University workspace(s) on certain days?
- Do you need a certain number of staff to cover breaks or regular surges in demand during the working day?

Hybrid working

- How many staff do you envisage as being on-site and hybrid workers?
- What opportunities might there be for team members normally based on-site to work remotely on a periodic basis and would that be valued by those individuals?
- Have there been any direct or indirect issues with hybrid working arrangements previously, such as during the Return to Workplace process, and can these be resolved?

Communication and team culture

- How and where will team meetings take place?
- How often will you expect to see staff in-person during the week?
- What activities require the team to be together in person and what is the frequency?
- How contactable will you expect staff to be when working remotely?
- Will different staff categories need different kinds of communication and support?

Learning from experience

- What practical changes should be considered to facilitate more effective hybrid working from previous experiences of working with colleagues and/or managing teams this way?
- What practical changes should be considered to facilitate appropriate levels of support to students, colleagues and other individuals and groups supported by the team?

Wider department

- How are other teams in the department going to be working?
- How will this impact your team?
- Any other interactions with external agencies and organisations, such as, suppliers, service providers, contractors, regulators, etc.

Step 2 - Suggested questions and general points to cover in discussions

Team meetings

- How have any hybrid working arrangements during and since the pandemic impacted the team? What have the advantages and disadvantages been?
- What tasks should be done remotely versus those that need to be done in the University workspace?
- What activities require the team to be together in person and what is their frequency?
- What practical solutions can the team support when the operational needs and individual preferences appear to conflict?
- Considering the parameters already identified by the department, faculty or institution, are there any exceptions to the arrangements that should be standard (for example, in the run up to a new academic year when there may be a higher volume of work that needs to be undertaken on-site?)
- How often should the working arrangements be reviewed?
- How should staff let others know where they are and their availability?
- How and where will team meetings take place?

Individual meetings

(Depending on individual circumstances, not all questions may be relevant.)

- How has the staff member found any hybrid working arrangements they have experienced during and since the pandemic? What have the advantages and disadvantages been for them personally?
- What is the staff member's preference about working in a hybrid way, taking into consideration the area's agreed general level of hybrid working (and any associated parameters) and the operational needs of the team.
- What kind of tasks in their role can be carried out from a remote working environment? (See Annex B for examples of tasks that could be delivered from a remote working environment)
- Where relevant, are there any reasonable adjustments in place or that need to be considered (for further information see [Reasonable adjustments](#)).
- Is there anything they will need to change in the way they work to move to hybrid working arrangements (or to continue temporary arrangements that may already be in place?) Are there any external factors that need to be considered when reaching a decision?
- What will be challenges of moving to hybrid working arrangements and what mitigations can be implemented? (These may be impacts on the staff member, wider team, manager or students/staff/customers/visitors.)
- Are there any barriers arising from the requirements of sections 7 and 8 of the Hybrid Working Policy (covering conduct and performance when working in a hybrid way, and conditions around the remote working environment)

General points to cover in the meeting when discussing and agreeing hybrid working arrangements

- The contractual location of work (as notified in their contract of employment) will remain unchanged.
- In addition to any regular attendance, individuals need to attend activities and/or meetings in the University workplace as necessary or when specifically requested by their line manager (or their department, faculty or institution) with reasonable notice.
- Individuals based in teams providing in-person support or services may also need to attend at short notice in cases of colleagues' absence or in other urgent situations.
- Agree the next step in the process, as appropriate:
 - following up on arrangements agreed in the meeting subject to the health and safety assessment, or
 - considering the requested arrangements (and discussing with other team members if appropriate) and meeting again to discuss the possible hybrid working arrangements.

Annex B. Examples of on-site and hybrid working tasks

The following lists of tasks are examples of the types of tasks that are likely to need to be performed in the University workspace and those that may be suitable for undertaking in a remote working environment as part of hybrid working arrangements.

This list is not exhaustive and consideration needs to be given to the context in which the tasks are normally undertaken when deciding whether or not they do need to be performed onsite or remotely.

University Workspace Tasks	Remote Working Tasks
<p>Teaching for all students on taught courses (unless pedagogical reasons support periodic online teaching and learning).</p> <p>Research, supervisory, technical and administrative tasks requiring the use or production of equipment or objects only available within the University workspace.</p> <p>Responsibilities for the maintenance of equipment or objects within the University, such as the upkeep of paper archives or the distribution of store goods.</p> <p>Responsibilities for services delivered within a physical location such as:</p> <ul style="list-style-type: none"> • reception and other welcoming services • collection and disposal of waste from laboratories • cleaning offices and maintaining workshops. <p>Responsibilities for the health and safety, security or welfare of others who are on-site, such as monitoring and facilitating access to University spaces and responding to breaches of security.</p> <p>Tasks around setting up and the use of University spaces for self or others, such as examination preparation and invigilation.</p> <p>Any other tasks that need face-to-face interaction with students /other staff / customers / clients / visitors to be undertaken successfully, either in the University workspace or at events outside of the University workspace.</p> <p>Tasks requiring in-person attendance as directed, such as training courses, induction sessions, and team meetings.</p>	<p>Tasks involving working with documents and information that are stored and can be accessed remotely, such as the collation of exam materials or committee papers.</p> <p>Responsibilities for services that require no in-person interaction and / or are designed to be delivered remotely, such as network support or providing an email-based advice and guidance service.</p> <p>Responsibilities for the maintenance or upkeep of equipment and services held and/or solely accessed remotely, such as network management.</p> <p>Attending meetings that do not require physical presence and can be held remotely.</p> <p>Discreet, periodic on-line tasks such as undertaking refresher training.</p> <p>Reading-related tasks, such as reviewing articles catching up on departmental information.</p> <p>Writing-related tasks, such as:</p> <ul style="list-style-type: none"> • developing research proposals and grant applications • writing up research work • preparing presentations. <p>Administrative tasks such as processing orders and formatting documents for others.</p> <p>Other computer-based tasks, such as:</p> <ul style="list-style-type: none"> • data analysis • programming • database management.



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