

HYBRID WORKING STAFF TOOLKIT

Purpose:

This toolkit has been developed to assist all staff in considering and agreeing a workstyle appropriate to business requirements and, where possible also meets their personal preferences. It has also been created to support managers and staff record workstyle agreements. **It should be read in conjunction with the AFBI Hybrid Working Policy.** Additional advice and guidance can also be obtained from your line manager, HR Connect and AFBI HR/People and Culture Branch.

Within this toolkit you will find practical help, guidance and links to associated support resources already available to AFBI staff and managers.

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HYBRID WORKING REQUEST PROCESS

Introduction

Employees must make a request for a **regular** pattern of hybrid working under the Hybrid Working Policy. Staff should make their request to their line manager by email using the request form at Appendix 1 - Request for Hybrid Working.

Informal i.e. casual or incidental hybrid working arrangements must also be facilitated under the Hybrid Working Policy by completing the same request form – Appendix 1 – Request for Hybrid Working.

The necessary general homeworking and DSE homeworking risk assessments must also be completed before any working from home is carried out. Please see the following links for relevant documentation:

- [Health & Safety- DSE home working risk assessment questionnaire](#)
- [Health & Safety- homeworking risk assessment questionnaire](#)

There is no requirement for staff opting to work at all times from their designated workplace to apply for hybrid working. If you work from an AFBI site as your responsibilities cannot be completed at home, those on-site working arrangements will be assumed to continue unless a Workstyle Agreement is in place.

Please note that AFBI do not require the use of the Abridged Workstyle Agreement as per the case with the NICS Hybrid Working Policy.

Hybrid Working Requests

Managers should aim to respond to requests and agree the outcome with the member of staff within 28 days. Any employee who feels that their request has not be considered fairly and consistently can appeal – see Appendix 2. Status quo arrangements should continue until the outcome of any appeal, at which point the decision is final.

Not all business areas and roles will be suitable for working from home; for example laboratory, field-based roles or site specific work that has to be carried out in the workplace. Managers will be responsible for considering the potential to work from home fairly and consistently, taking account of the Equal Opportunities Policy NICS [Equality Diversity & Inclusion Policy](#), [HSENI and](#)

[PHA guidance](#). The most important factors to consider are service delivery and the needs of the branch, the individual employee's role in providing an effective service and the employees work preferences. Managers must ensure that effective service delivery is maintained, but should aim to facilitate the work preferences of all staff members of their team as far as possible in reaching workable solutions. It may, for example be necessary to spread the scope and opportunity for home working across a team.

A focus on the various elements of jobs should help identify those tasks that can be performed effectively away from the workplace base. The following considerations should be taken into account to decide if the work can be undertaken at home and the templates provided in Parts 1-7 are intended to guide all staff through the process:

- What is the service provided and what is the impact upon the individual's work load and the work of the team?
- What will be the effect on service delivery?
 - Has the Homeworking Risk Assessment highlighted anything that may make the home working environment unsuitable? [Health & Safety- homeworking risk assessment questionnaire](#)
- Does the job require a lot of face to face communication between colleagues/groups of staff?
- Can the work be monitored in terms of output, or is it possible to come to an agreement with the employee about the amount of time particular outputs and deliverables will take?
- How will contact with the manager and team be maintained?
 - What equipment would be required? Are there any additional requirements identified from the DSE Homeworking risk assessment - [Health & Safety- dse home working risk assessment questionnaire](#)
- Are there any reasonable adjustments required and how can these be made?
- What costs would be incurred?
- Over what period would the home working arrangement apply?

The immediate line manager is then required to make a recommendation but to ensure consistency within Branches, the final decision will be made at least at Grade 7 level, although some branches may decide that the final decision should be made at Head of Branch level. If the request is ultimately rejected, the line managers and relevant decision maker are expected to detail the rationale.

Ultimately, a hybrid working arrangement should only be agreed if the following principals can be met:

1. Employees must be able to fulfil the normal duties of their post in full.
2. Health and Safety responsibilities must not be compromised.

3. The service to others and/or completion of managerial responsibilities must be fulfilled properly.
4. The laboratory and/or office where the individual works must have an adequate number of people present onsite at any given time.
5. Employees must be contactable during working hours unless agreed with management.
6. An employee must be able to do all their work at home and not result in any other members of the team acting up in their absence.
7. Work tasks carried out at home must be agreed by a line manager.

If agreed, arrangements may be on a regular weekly basis or for part days/weeks on a rota or pattern basis. The agreed hybrid working arrangements should be formally recorded as a Workstyle Agreement and a copy held by the line manager and employee as per branch arrangements.

Home working may not be suitable for individuals who have not achieved satisfactory performance markings in their most recent performance review, are on a performance improvement plan and for example require a period of close supervision. Likewise new staff members, are expected to be available to work on-site as required, as a minimum, for the first 4-6 weeks of employment for induction purposes. This will facilitate important aspects of induction such as face to face mentoring for a period of time or on-site training if necessary. Reasons such as these should be fully explored prior to consent being given for hybrid working or to any decision to curtail or suspend a hybrid working agreement.

Careful consideration should be given to all the aspects outlined by both the employee and line manager when requesting hybrid working.

The request process facilitates the completion of a 'Workstyle Agreement' and has 7 parts:

- Part 1 – Employee Information (to be completed by the employee)
- Part 2 – Background Information (to be completed by the employee)
- Part 3 – The Job - nature of the job and main activities (to be completed by the employee in conjunction with their Line Manager)
- Part 4 – Line Manager's Checklist (to be completed by the Line Manager)
- Part 5 – Employee's Declaration (to be completed by the employee)
- Part 6 – Line Manager's Recommendation & Workstyle Agreement (to be completed by the Line Manager)
- Part 7 – Grade 7 Manager's/Head of Branch Decision (to be completed by the Grade 7/Head of Branch)

The following templates in Parts 1-7 have been designed to guide managers and staff through the process and reach a decision that is mutually agreeable.

REVIEW

Workstyle agreements must be reviewed regularly (at the End of Year Review. Changes to business needs, the nature of the business or changes to team personnel for example may require a review of an existing workstyle agreement. Likewise, a staff member may request a change.

APPENDIX 1 - REQUEST FOR HYBRID WORKING

To be completed by the employee making the request

Part 1 - Employee Information:

Name:	
Branch:	
Grade:	
Payroll Number: If you are agency staff, please enter AGENCY	
Home Location (city/town/village)	
Contact Telephone No (provide number that is best to reach you on):	
Preferred home working arrangements (to include home/workplace split, times/days and weekly/monthly pattern, e.g. you could specify a number of days per week/month or expected % timespend per week/month that will be workplace based and if days will vary from week to week according to work schedule or a rota):	

Part 2 - Background Information:

Have you completed the Homeworking Risk Assessment and DSE Home working Risk Assessment questionnaires?	
Do you currently have reasonable adjustments made to your work or working area and are you content your home environment meets your needs?	
Are you aware of any issues that might restrict home working or the effective date? e.g. insurance issues, lease restrictions, poor Wi-Fi signal, need access to IT or	

resources only available at specific location(s)	
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Do you understand that if your request is met you will still be required to attend the workplace when required, e.g. for meetings, courses, collaborative work etc. and that arrangements may be subject to changes?	
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Are there any other considerations you feel should be taken into account in relation to your request?	
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Part 3 - The Job:

To be completed by the employee in conjunction with their Line Manager

<p>Briefly, what is the nature of the job, how and where is it usually carried out? Consider here the main activities of the job and the extent of:</p> <ul style="list-style-type: none"> • Working alone at a desk, on a computer • Need to access hard copy reference materials, case files etc. • Scheduled meetings and contact needed with other employees, customers and stakeholders - face to face, telephone, e-mail and alternatives • Time usually spent at locations other than your designated workplace • Collaborative work e.g. project work, the exchange of ideas/information and access to tools/facilities 	
<p>Which of the duties could be carried out at home? How much of the working week/month do these usually take up?</p>	
<p>Which of your duties can <u>only</u> be carried in the workplace? e.g. access to files, hard copy reference material, and specialist IT etc. How much of your working week do these take up?</p>	
<p>Has the Homeworking Risk assessment been completed? And were there any risks that could not be addressed?</p>	

<p>Have you completed the DSE Homeworking Risk Assessment questionnaire? Will you need any furniture or additional equipment at home?</p>	
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Part 4 - Declaration by employee:

I confirm that I have discussed and agreed the contents of this form with my line manager. I confirm that the information documented on this form is correct to the best of my knowledge. I have read and understood the Hybrid Working Policy. I understand that any working from home working pattern agreed will be subject to regular informal review throughout the year and formal review at the End of Year performance appraisal. I also understand it does not constitute any change to my contractual terms and conditions and can be removed at any time if deemed not to suit the needs of the Branch.

Name of Employee	
Signed	
Date	

Part 5 - Line Manager's Checklist

To be completed by the Line Manager

I have discussed this request with my staff member and the following has been agreed:

<p>Performance Management How the employee's performance will be monitored and overseen</p>	
<p>Work Pattern Outline home/workplace split, times/days and weekly/monthly patten and locations e.g. you could specify a number of days per week/month or expected % time spend per week/month that will be workplace based and if days will vary from week to week according to work schedule or a rota. Details of any trial arrangements and/ or trial period including review date</p>	
<p>Contact & Communication Brief summary of what has been agreed. - How will you make sure that they continue to feel part of the team and are kept up to date? - How will information be provided to the employee? And the team? - How will you ensure that the employee is included in team meetings, updates, training and development activities and opportunities for promotion or alternative work, without requiring frequent attendance at a workplace?</p>	
<p>Any issues that might affect the employee working away from the workplace? What have you agreed to overcome these?</p>	
<p>Are there any business needs that will be affected by this request? What have you agreed to overcome these?</p>	
<p>Has the Homeworking Risk Assessment and DSE Homeworking Risk Assessment questionnaires been completed and have you dealt with any issues and mitigated any risks raised?</p>	

<p>Do you believe that the employee understands all the issues involved in homeworking and will be able to perform effectively? If not, explain your reasons.</p>	
<p>Have you explained the requirements for on-site attendance attend e.g. on particular days at the request of your line manager or head of Branch, for example for in-person training and for meetings that your line manager or head of department has determined are best conducted in person.</p>	

Part 6 - Line manager recommendation

(Delete as appropriate)

I have considered the request for hybrid working and have discussed this request with the employee.

The employee has confirmed that they have a suitable and safe location in their home from which to work.

I confirm that the following principals are met (Please tick):

The employee will be able to fulfil the normal duties of their post in full.	<input type="checkbox"/>
Health and Safety responsibilities are not compromised.	<input type="checkbox"/>
The service to others and/or completion of managerial responsibilities can be fulfilled properly	<input type="checkbox"/>
The laboratory and/or office where the individual works must have an adequate number of people present onsite at any given time.	<input type="checkbox"/>
The employee will be contactable during working hours unless agreed with management.	<input type="checkbox"/>
The employee will be able to do all their work at home and not result in any other members of the team acting up in their absence.	<input type="checkbox"/>
Work tasks carried out at home have been agreed by a line manager	<input type="checkbox"/>

I recommend their request is approved and the following details/conditions form their

Workstyle Agreement:

Outline home/workplace split, times/days and weekly/monthly patten and locations e.g. you could specify a number of days per week/month or expected % time spend per week/month that will be workplace based and if days will vary from week to week according to work schedule or a rota.	
Details of any trial arrangements and/ or trial period including review date:	
Review Date (at the End of Year Review):	

OR

I have considered the request for hybrid working but do **not recommend** to this request for the following reason/s:

Line Manager Name	
Line Manager Signature	
Date	

Part 7 – Grade 7/Head of Branch Decision

I confirm that this request is approved and the following details/conditions form their **Workstyle**

Agreement:

Outline home/workplace split, times/days and weekly/monthly patten and locations e.g. you could specify a number of days per week/month or expected % time spend per week/month that will be workplace based and if days will vary from week to week according to work schedule or a rota.	
Details of any trial arrangements and/ or trial period including review date:	
Review Date (at the End of Year Review):	

I have considered the request for hybrid working but do **not recommend** to this request for the following reason/s:

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Line Manager Name	
Line Manager Signature	
Position	
Date	

APPENDIX 2 - APPEAL PROCESS

In the event that the employee does not agree with the manager's decision the employee may appeal under the [Uniform Appeals policy](#) in the Staff Handbook.

Please be aware that current status quo arrangements will continue until any such appeal is heard. The decision will be final.

APPENDIX 3 - PERFORMANCE MANAGEMENT

The principles of performance management are the same for homeworkers as for workplace-based employees. It is important that managers conduct regular Performance and Development conversations, in line with NICS [Performance Management](#) policy.

People working from home may need support and your focus as a manager should be encouraging sharing of any concerns, regular conversations and making wellbeing a priority as they adjust to their new ways of working.

Managers must continue to ensure regular development conversations are incorporated into their discussions with staff and proactively encourage and seek out opportunities for the development of the whole team including those working or from home.

Set Clear Expectations

With a dispersed team, there is always the risk of misunderstandings and team members not being sure what is expected. It is important to manage expectations and stay focused on goals, deliverables and outcomes when embracing a team that includes hybrid workers.

- Be clear what you expect of all members of your team, their objectives, deliverables and deadlines.
- Ensure that all staff are included in work planning events. Communicating a clear plan and expectations upfront will benefit the whole team.
- Avoid duplication of work by making sure that the whole team know what colleagues are working on.

Stay Focused On Delivery, Not Just Activity

All performance and development conversations within AFBI including those for hybrid workers, should be in line with the policy objectives i.e.

- to identify how an individual's work (and their agreed performance and outputs) contributes to business objectives;
- to ensure individuals have regular and constructive feedback on how effectively they are performing; to help identify and support development needs, and to enhance performance and develop potential;

- to help line managers recognise and proactively manage underperformance informally during the reporting period;
- to help identify satisfactory and unsatisfactory performance;
- to help managers to manage unsatisfactory performance up to the required standard using the formal performance improvement procedure.

Facilitating regular conversations about performance and development with all staff is simply about good management and supporting and developing your team to reach their potential. The approach should be as light touch as possible, but aims to deliver fairness and consistency across teams within AFBI. Simply put it is more about **people** than **process**.

More about Focusing on Outcomes

Having clearly defined objectives helps to put actions in place, understand what needs to be done, and empower staff to complete work. The agreed objectives should be concise, specific and written in output terms. To support this it is useful to understand what the key features of each objective are and to break these down.

The [NICS Competency Framework](#) is an integral part of the performance management arrangements. Staff and Line Managers must refer to this framework when agreeing or updating the Personal Performance Agreement/Personal Development Plan and when conducting performance reviews. Managers and their staff should take joint responsibility for agreeing objectives and expectations should be adjusted for the circumstances of the employee if required.

Dealing with Changes in Performance

The NICS policy on Performance Management applies to all staff in AFBI regardless of their working arrangements which may be within a workplace environment or home setting. When a member of staff's performance slips below, or fails to reach, the expected standard, it can impact on not just them, but also the rest of the team, their manager and the wider performance of the business. What is more, when underperformance issues are not addressed and managed both appropriately and sensitively, they can become much more serious over time.

Line Managers are responsible for providing regular feedback and support to their staff to help them reach and maintain the required performance standards and achieve their objectives. This includes addressing underperformance, where it arises, at the earliest opportunity and giving the employee a reasonable opportunity to improve their performance. Early identification of performance issues is made easier by the Line manager maintaining sufficient regular contact with their staff to monitor their progress and to notice changes in their performance.

Line Managers need to work with the member of staff to try to understand why they are under performing and what can be done to help them improve to the required standard. A quiet word of advice or encouragement is often all that is required to improve the individual's performance. In most cases, dealing with any issues proactively will prevent performance deteriorating to an unsatisfactory level and so avoid the need to move to the formal performance improvement procedure, which can be challenging and time-consuming for all involved.

APPENDIX 4 – COMMUNICATION

Keeping in Touch

Regular contact with staff working at home is vital to ensure that staff feel sufficiently supported, part of the team and are aware of any changes at Team and Branch/Directorate levels.

Managers and staff should agree regular check-ins and the frequency and method of how to raise things urgently when needed. Communicating effectively with your team and direct reports is important to ensure that they are able to continue working as normal. There also needs to be strong feedback channels to keep staff productive, motivated and committed to meeting their agreed objectives.

Managers should encourage ways to stay connected that works for all the team as well as at individuals. Ensure staff are aware of the various guides and information available on home working including the need to take appropriate breaks away from their work during the day. See the following links;

- finance-ni.gov.uk
- [Health & Safety- home working guidance](#)
- [Health & Wellbeing](#)

Managers should avail of the learning bundles to get the most out of their interactions with staff and teams using the IT platforms available in their Branch. A wealth of information on learning and development on a variety of topics, such as leadership, remote working, well-being, performance management and essential learning for line managers can be found on [LnKS LearningBundles](#).

Tips and Techniques

• Establish communication norms

Agree a communication pattern e.g. team group chats on WebEx; Jabber and Zoom for business calls and meetings, and WhatsApp for socialisation depending on the size of the team. Use weekly video calls to discuss both work initiatives and to catch up on how the team is getting on as well as getting feedback from staff on recent business communications.

• Email communications

Use chat and instant messaging tools unless email is required for official records – this will help reduce the volume of emails in in-boxes. If you are in the habit of working outside of normal hours consider send emails using the 'delay send' feature in Outlook. This will ensure that you do not inadvertently set up a long working hour's culture or set an expectation that emails out of hours should be responded to immediately.

Sharing your calendar

Employees must use the Outlook calendar and share this with your manager and team to ensure everyone is kept abreast of availability.

- **Don't bombard your team with messages**

Sometimes when you're not having face to face meetings it's easy to bombard staff/colleagues with email or instant messages. Pay careful consideration to what should be communicated based on how important and relevant the information is to your team. Consider carefully who is required to be included on cc lists and who really needs to get the information.

- **Create virtual communication spaces**

Video conferencing functionality (e.g. WebEx) encourages teams to work together:

- Teams can work in different virtual spaces
- The WebEx white board facility (under the share option) can be shared to optimise collaboration and is particularly useful for those who like to work with images and diagrams.
- Documents such as Word, PowerPoint and Excel can be shared as can other desk top apps such as video streaming from the internet
- Staff can request the 'record' functionality to share video talks and presentations when required

Jabber has functionality regarding screen sharing and you may select which open document or applications you wish to share. Don't forget you can work together on documents and edit 'as you go'.

- **Ensure your team know how to use virtual communication spaces**

Whilst some teams use tools such as Jabber, and WebEx, Microsoft Teams, WhatsApp, Zoom in the office, for others these are new concepts. The feeling of isolation is increased when staff don't know how to use chosen communication methods and how to make best use of them to optimise team working. Hints and tips should be shared regularly.

- **Staying safe online**

Please refer to AFBI's Hybrid Working Policy for a full list of relevant cyber security and information management policies. Ensure that voice activated smart devices such as Alexa, Siri etc. are turned off when home working as this helps protect any information you may discuss with others while you are working.

- **Create opportunities for people and teams to connect with each other socially**

Consider how to manage 'one to one' meetings. Encourage teams to call and speak with each other regularly. Consider using video calls to have virtual tea and lunch breaks. Consider extending business meetings by a few minutes to create a culture of good social interaction.

- **Have regular meetings**

Online, chat, email and webinars are great communication tools; however don't lose sight of the importance of seeing and speaking to individuals in person or using a one to one video call. Whether this is by having an online video meeting or agreeing a space in your workplace location, or suitable alternative to get together, meet, communicate and collaborate.

- **Show leadership**

Heads of Branch as well as line managers, should communicate effectively with their staff. Having a monthly video call or pre-recorded webinar from the Head of Branch or Principal Officer encourages the feeling of togetherness and promotes a culture of wider team communication. Hosting meetings can be rotated to different team members to encourage ownership and participation by staff and can help staff confidence and technical skills in using online tools. Don't forget to provide a feedback channel at the end of these meetings and address staff issues and concerns quickly. As always, leaders and managers should not micro manage but instead empower staff to set up effective communication and collaboration practices. Review Workstyle Agreements regularly (at least annually at the End of Year Review) and give staff as much notice as possible if changes are required.

- **Be social**

Remember the social side of working in a team. Ensure that communications aren't all about work. Have a social 'team time' using video calling or agree to meet up in an appropriate space for coffee and an informal chat. This will help limit any feelings of isolation and is important in keeping teams communicating with each other. It also provides another way of keeping people in the loop and builds a culture of team collaboration/working together to deliver services.

- **Be creative**

Think of new ways you can stimulate creative thinking for your team to work better together. There are plenty of online resources to get teams started.

APPENDIX 5 – USEFUL RESOURCES

Links to Other Useful Resources (ensure your Links app is open on your desktop to gain access)

- [Performance Management e-learning](#)
- [Top Tips for Managing a Hybrid Working Team](#)
- [Top Tips for Effective Online Meetings](#)
- [Tips for Healthy Remote Working](#)
- [Top Tips to Lead your Team Remotely](#)
- [Having Difficult Conversations Remotely \(Webinar\)](#)
- [Delegating to Virtual Team \(Webinar\)](#)
- [Managing Conflict in a Virtual Setting](#)
- [Developing Resilience in Remote Teams \(Webinar\)](#)
- [Mental Health Awareness for Managers managing Remote Teams \(Webinar\)](#)
- [Tips for Wellbeing at Home](#)
- [Health & Wellbeing](#)