# Flexible working request

You should submit this form to your line manager.

Before completing the form please read the [flexible working policy and procedure](https://www.york.ac.uk/admin/hr/policies/leave-and-absence/flexible-working/policy/).

It will help your manager to consider your request if you provide as much information as you can about your desired working arrangements.

## About you

|  |  |
| --- | --- |
| **Name** |  |
| **Job title** |  |
| **Department / section** |  |

## Your flexible working request

|  |  |
| --- | --- |
| **Date of request** |  |

**Reason for the request (tick all that apply)**

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| --- | --- |
|  | I have responsibility for the upbringing of a child under 17 or a child under 18 with a disability AND I am the mother, father, adopter, guardian or foster parent OR I am the spouse / partner or civil partner of the above |
|  | I am caring for an adult who is my spouse, partner, civil partner, or relative OR who lives at the same address |
|  | I am applying for flexible retirement |
|  | I would like to request a change of working hours (fte) |
|  | I would like to change location and/or my pattern of work within existing hours |

**I am applying for the following reason:**

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## Your current working arrangements

**Describe your current working arrangements (days / hours etc)**

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**Describe your desired working arrangements (days / hours etc)**

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**Detail any issues, problems and benefits that may arise from your proposal with respect to the service and/or your colleagues**

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**How could these be addressed?**

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**If you are applying jointly with others please list their names**

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**Intended start date\***

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\*For flexible retirement requests, this is the intended start date of the reduction in hours. Your flexible retirement date will be the day before this date.

## Flexible retirement arrangements

Only complete this section if you are making a request for flexible retirement.

**Are you an active member of a pension scheme, if so please enter the name of the scheme.**

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**In accordance with the flexible working arrangements policy you need to confirm the following:**

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| --- | --- | --- |
|  | **Yes** | **No** |
| Have you submitted this at least six months before the intended change date? |  |  |
| Are you still under probation? |  |  |
| Have you worked continuously at the University for 26 weeks? |  |  |
| Have you made another flexible retirement request in the last 12 months?\* |  |  |

\*Where you have withdrawn and modified an application for flexible retirement, you may resubmit it within 12 months of the original application.

**Describe your desired arrangement, include the proportion of your hours and salary you wish to reduce and / or the type / grade of role to which you wish to move.**

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**What percentage of your pension benefits available under the pension scheme would you like to take?\***

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\*This may be provisional and not binding at this stage but will have to be notified to the relevant pension scheme as part of this application.

|  |  |
| --- | --- |
| **Signature** | **Date** |
|  |  |

## For completion by Line Manager

Before completing the form please read the [flexible working policy and procedure](https://www.york.ac.uk/admin/hr/policies/leave-and-absence/flexible-working/policy/)

|  |  |
| --- | --- |
| **Name** |  |
| **Job title** |  |

**Please comment on benefits that may be gained by agreeing to the flexible work request**

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**Identify operational, financial, staffing or service- related problems that may arise if approved**

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**Identify ways in which the problems above may be overcome to enable the request**

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**If you believe you cannot overcome the problems identified but have an alternative suggestion for a compromise arrangement give details here**

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| **Do you recommend approval of the request? (Yes/No)** |  |

**Signature**

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## For completion by Head of Department if flexible retirement requested

In consultation with your Faculty Dean for Academic departments or the Registrar for support departments

**Describe how the requested arrangement for Flexible Retirement is in the Departmental and Institutional interest including strategic, operational, financial, staffing and service-related benefits.**

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**What role will the applicant undertake under the requested new arrangement if approved? If the individual is currently in an academic role, the normal expectation is that this will continue ie. teaching, research and admin. If this is not the case, describe the changes.**

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| **Has it been checked with the HR Partner and Faculty Dean or Registrar whether the proposed revised role will impact on the grade of the role? (Yes/No)** |  |

**Provide detail below of the specific job and performance expectations of the individual under the requested new arrangements**

Please note that if the flexible retirement application is approved, the revised specific job and performance expectations of the individual should be attached to the latest Performance Review as an addendum

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## For completion by Head of Department

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| **Request approved (Yes\*/No)** |  |

**Reason for refusal of request (Check those that apply)**

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| --- | --- |
| Burden of additional costs |  |
| Detrimental effect on ability to meet customer demand |  |
| Inability to reorganise work among existing staff |  |
| Inability to recruit additional staff |  |
| Detrimental impact on quality |  |
| Detrimental impact on performance |  |
| Insufficient work during the periods employee proposed to work |  |
| Planned structural changes |  |

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| **\* If this is a flexible retirement request, has approval from the Faculty Dean / Registrar been granted? (Yes/No)** |  |

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| **Faculty Dean / Registrar's signature** | **Date** |
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## For completion by the Department

If the application is approved, the department should confirm the new contractual arrangements to HR Services by completing the details below:

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| --- | --- |
| **Revised weekly hours** |  |
| **Effective from** |  |
| **Cost code** |  |
| **Effective until** |  |

**Additional details**

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**The following working arrangements have been agreed**

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**Give any reasons for any compromise arrangements reached**

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| **Commencement date** |  |
| **Trial period (Yes/No)** |  |
| **Length of trial period** |  |
| **Review to be held on** |  |

|  |  |
| --- | --- |
| **Name** |  |
| **Signature** |  |
| **Date** |  |

## What to do next

- Forward to HR Services at [hr-enquiries@york.ac.uk](mailto:hr-enquiries@york.ac.uk?subject=Flexible%20working%20request) who will then update the HR Database, notify payroll/pensions and write to the employee confirming arrangements.

## HR SERVICES ONLY

**HR actions**

|  |  |
| --- | --- |
|  | Revised contract hours - confirmation letter, copy to Finance and Payroll and update Resourcelink |
|  | Flexible retirement request - refer to Pensions team. If approved produce confirmation letter, copy to Finance and Payroll and update Resourcelink |
|  | No change to working hours - file |
|  | Not approved - file |