

Work Life Balance Policy and Procedure

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Produced by the Schools HR Team

www.sefton.gov.uk

School

St Monica's

Signed by Chair

Ryan McLoughlin

Signed by Headteacher

James Gouldbourne

Date Reviewed

2027

Contents

Introduction. 3

Policy Statement 3

Scope. 3

Special leave. 3

The Law.. 3

Scope. 4

Procedure. 4

Definitions. 5

Family/Domestic Matters. 5

Non-Domestic Matters. 8

Voluntary/Public Duties. 9

Pension. 11

Local Government Pension Scheme ('LGPS'). 11

Teacher Pension Scheme. 11

Flexible Working. 11

Scope. 12

Procedure. 12

Right of Appeal 14

Additional Information. 14

Types of Flexible Working. 15

Job Sharing. 15

Compressed Working Week. 15

"V" Time. 15

Phased Retirement 15

Term-Time Only Working. 16

Annualised Hours. 16

Review of Procedure. 16

Appendix 1 Application for Special Leave (SL1) 17

Appendix 2 Request for Flexible Working Arrangements. 18

Appendix 3 Acknowledgement Of Receipt Of Flexible Working Request 20

Appendix 4 Letter Template in Response to Flexible Working Request 21

Introduction

The purpose of this policy is to identify potential methods of achieving a work life balance.

Work-life balance is about people having a measure of control over when, where and how they work. It is achieved when an individual's right to a fulfilled life inside and outside paid work is accepted and respected as the norm, to the mutual benefit of the individual, business and society. It is all about striking a reasonable balance.

Policy Statement

Sefton Council and St Monica's Catholic Primary School is committed to be a good employer, and to developing people and family friendly employment policies. This approach allows employees to balance their personal and working lives and helps Sefton and St Monica's Catholic Primary School to maintain employees' performance, loyalty, and motivation.

Scope

This policy applies to all staff employed within school and over an academic year (except for flexible working requests).

This policy covers the following:

- Special Leave

- The right to request Flexible Working

This policy will not cover the following which is covered by separate policies:

- Maternity Leave
- Maternity (Paternity) Support Leave
- Adoption leave
- Shared Parental Leave

Special leave

The Law

The Employment Relations Act 1999 gives employees the right to have unpaid reasonable time off from work when it is necessary for them to deal with unexpected or sudden emergencies which occur in relation to their dependants. The special leave provisions of this policy comply with the regulations.

All applications will be treated sympathetically and in relation to the specific circumstances surrounding the request. The Governing Body will consider every application carefully, making every effort to accommodate reasonable requests.

Scope

Special leave can be granted for:

- Domestic/Family matters
- Non-Domestic Personal matters
- Voluntary/public duties.

Procedure

1. Special Leave in any of the circumstances described above will only be granted on the submission of an application form.
2. In an emergency situation, the Headteacher should be notified of an employee's absence as part of the normal managing attendance reporting procedures. Emergency applications must be completed on the first day when an employee returns to their place of work.
3. It is essential that employees keep their manager informed of any developments to allow appropriate cover to be provided. Employees must notify their manager immediately if they are unable to return to work on the agreed date, stating the reason(s) why. Failure to do this may result in disciplinary action being taken, which, in turn could result in dismissal. Please refer to the Disciplinary policy.
4. Written evidence of the need for Special Leave should be provided wherever reasonably possible.
5. If it is discovered that a false reason has been given for obtaining Special Leave, this will be considered as misconduct which will be dealt with under this school's Disciplinary policy and procedures.

6. Any queries relating to Special Leave should be directed to the Headteacher.
7. The application form should be submitted to the Governing Body via the Headteacher.
8. The Governing Body has the discretion to grant Special Leave, irrespective of whether leave has already been taken or not. The form will be returned to the employee stating the Governing Body's decision as soon as possible. A copy should be held in school on the employee's personnel file and/or timesheet, where appropriate. School should also notify payroll.
9. The granting of Special Leave is at the discretion of the Governing Body and may be with or without pay.
10. If an application for paid leave is refused after the leave has been taken annual or unpaid leave will be counted against the absence.
11. The Governing Body will need to have regard to the following guidelines and to the circumstances of each case and ensure that employees who apply are, where possible, given a decision in advance of the event.
12. Employees wishing to apply for Special Leave for; bereavement, care for seriously ill dependant/partner, family/domestic crisis, visits abroad and religious holidays should complete application form SL1 (Appendix 1) prior to the leave being taken and give a reasonable amount of notice, having regard to the circumstances. In cases of visits abroad and religious holidays, a minimum of 4 weeks' notice should be given.

Definitions

The definitions of the following phrases used in section 4 of this guidance are:

- **Close relative** – someone who is related by blood, for example, mother, father, brother, sister, children, grandparents, etc. Or someone who you have a close emotional relationship, e.g. partner's siblings, partner's parents, stepchildren, adoptive parents, etc.

- **Partner** – someone whom you have a close and stable (i.e. long-term) relationship with. This includes married couples, civil partners, individuals who are living together though they are not related by blood or marriage, including those in same sex relationships.

- **Dependant** – a spouse or partner, child or parent or someone who lives with you as part of your family. E.g. this could include an elderly relative who lives in the household. A dependant may also be someone who reasonably relies on you for assistance. You may be the primary carer, or you may be the only person available to help in an emergency.
 - · **Child** – someone who is under the age of 18.
 - · **Week** – a period of any seven consecutive days.
 - · **Carer** – someone who has responsibility to assist in the care of a dependant, that is an adult or child who has a serious long-term illness, a disability or terminal illness, or has care needs due to old age.. This definition does not include general childcare.

Family/Domestic Matters

Whilst the following table provides a guide, it is for the Governing Body to make decisions on applications for special leave, having regard to this guidance and statutory requirements. It does not automatically provide an entitlement for staff for time off.

Leave	Limit	Who/How
Bereavement of a close relative, partner or dependant	Up to 5 days leave - includes 1 day to attend funeral. With or without pay at the discretion of the Governing Body.	In all other circumstances, when annual leave is considered inappropriate, one day's special leave with pay may be granted to attend funerals of non-blood relatives, close friends, or in-laws. Consideration of other factors should be given, such as travelling to and from a funeral, especially where the journey involved is long or difficult; also, whether the employee is required to attend other formal cultural or religious ceremonies in connection with the bereavement. Paid leave cannot be authorised for clearing the estate of the deceased. The Governing Body have the discretion to allow additional leave in response to an employee's individual circumstances as they see appropriate, proportionate and reasonable.
Bereavement of a child	See the above section of this table for entitlements (and in addition) A minimum of two weeks statutory leave entitlement Statutory pay where thresholds met.	This additional statutory leave must be taken within 56 weeks following the child's passing. The additional statutory leave must be taken in blocks of one or two weeks. The employee's terms are protected during this statutory two-week period expect for those covering remuneration. The additional statutory leave applies to parents of a still born child after 24 weeks of pregnancy. Employees with a minimum of 26 weeks continuous service with their employer prior to the child passing will be entitled to statutory parental bereavement pay for the statutory two weeks leave.
Breakdown of care arrangements	Up to 5 days special leave. With or without pay at the discretion of the Governing Body.	For employees where normal arrangements for the care of a child, elderly relative, or dependant, unexpectedly breakdown. To allow employees to make alternative care arrangements. For example, the person normally responsible for providing the care falls ill or fails to turn up.

Emergency care of children, elderly relative or dependants	Up to 5 days special leave. With or without pay at the discretion of the Governing Body.	Employment legislation allows all employees the right to take reasonable, unpaid, time off from work to deal with certain unexpected or sudden emergencies/domestic crises. This would cover circumstances when an employee must care for a sick child, elderly relative or dependant provided that no other alternative arrangements can be made. The Governing Body have the discretion to allow additional leave in response to an employee's individual circumstances as they see appropriate, proportionate and reasonable. Employees required to attend a medical appointment for their children, will be required to where possible, make these arrangements outside of their contracted working time.
Carers Leave	Up to 5 days leave. With or without pay at the discretion of the Governing Body.	The Carers Leave Regulations 2024 provides the right to take at least 1 week of unpaid carer's leave per year to provide or arrange care for a dependant who has a long-term care need due to a physical or mental illness, a disability or old age (A 'week' means the length of time an employee usually works over 7 days). The leave can be taken flexibly in a block or in individual or half days to suit the caring responsibilities throughout the year. Employees are required to give notice before they want their leave to start. If the request is for half a day or a day, the notice period must be at least 3 days. If the request is for more than one day, the notice period must be at least twice as long as the requested leave. For example, if the request is for 2 days, the notice period must be at least 4 days. This leave is per employee and not per dependant
Compassionate grounds	Up to 3 days leave (up to 5 days in exceptional circumstances) With or without pay at the discretion of the Governing Body.	If an employee has adequate compassionate grounds or where hardship would otherwise occur, in order for them to make suitable arrangements to resolve the issue. Grounds could include, for example, where there has been a fire or flood at the family home, or a burglary has taken place. An employee's application should include a full explanation of the hardship that would arise if special leave were not allowed.

Domestic reasons/crisis	Up to 5 days leave With or without pay at the discretion of the Governing Body.	If an unforeseeable domestic emergency arises, to enable an employee to deal with the problem or to make satisfactory long-term arrangements for dealing with the problem. As circumstances will vary employees, must give full details of the emergency or crisis in their application. Applications could be made due to any of the following examples: · a dependant is involved in an accident or is assaulted; · a child is involved in an incident at school or during a school trip; or unforeseen arrangements that need to be made as the result of a personal crisis. These provisions do not apply to circumstances such as domestic appliance breakdowns.
Foster Carers	Up to 5 days leave With or without pay at the discretion of the Governing Body.	There is no statutory provision for time off to undertake training or meetings. School may provide time for employees to attend necessary meetings and/or training provided by the Fostering Agency.

Non-Domestic Matters

Leave	Limit	Who/How
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Examinations/Study Leave	Up to one day for the Examination. Up to one day for the special study prior to the Examination. With or without pay at the discretion of the Governing Body.	Leave for the purposes of sitting examinations applicable to the individual's professional role and leave for special study immediately prior to the same examination. Evidence should be provided where reasonably possible.
Cancer Screening	Necessary time off with pay as agreed with the Governing Body.	Necessary paid time off shall be granted to staff for cancer screening.
Time Off for Medical Appointments	Paid time off will be given for the actual time away from work subject, normally, to a maximum of 2 hours, after which, time off will be unpaid. Time off beyond 2 hours may be paid at the discretion of the Governing Body.	Employees have an obligation to minimise time off work. Medical appointments should be arranged at the beginning or end of normal opening hours and, if possible, outside normal opening hours. Normal opening hours are 09.00 a.m. to 4.30 p.m. Monday to Friday. The time off is subject to prior approval by the Headteacher. Suitable evidence of the appointment is required to support the application for time off. Attendance at work before and after the appointment is required where practicable. Medical appointments during a period of sickness absence will be treated as sick leave.

Attendance at Job and Course Interviews.	Time and pay are at the Governing Body's Discretion.	It is the policy of the School to grant time off for employees to attend job and course interviews in certain circumstances. The nature and locality of the interview will determine whether paid or unpaid leave will be granted. Where an employee is placed "at risk" of redundancy, reasonable paid time off is allowed to seek alternative employment. Apprentices who are nearing the end of their apprenticeship will be given reasonable paid time off to secure a role. In any event, evidence of the interview must be provided.
Religious Holidays	Time and pay are at the discretion of Governing Body.	It is recognised that some employees may wish to be absent from work to celebrate a religious holiday which does not coincide with Bank Holidays currently granted. If appropriate, the Governing Body may wish to consider allowing an employee to work on a Bank Holiday and take a day in lieu to celebrate their religious holiday if this is operationally feasible.

Voluntary/Public Duties

Leave	Limit	Who/How
Attendance at Meetings of Outside Bodies		Leave with pay will be granted where an employee is required to attend meetings of outside bodies (e.g. school governors, professional bodies excluding Trade Unions).
Trade Union Duties		Leave with pay will be granted for an employee to attend meetings for Trade Union duties at the discretion of the Governing Body. Leave with pay will be granted for annual conferences subject to a limitation on numbers and where it is operationally feasible.

Magisterial Duties		Leave will be granted with pay for magisterial duties.
Jury Service		An employee receiving a summons to serve on a jury must report the fact to his/her Governing Body, who shall grant leave of absence unless exemption is secured. An employee serving as a juror shall claim the allowance for loss of earnings to which he/she is entitled under the Jurors' Allowance Regulations currently in force. The employer shall then deduct from the employee's full pay an amount equal to the allowance received. Employees released early from jury service must inform their Headteacher immediately, or report to your normal place of work at the earliest opportunity. Failure to do so may lead to the financial recovery of pay granted to them. Jury Service is classed as Authorised Leave of Absence and therefore Pension is not affected.
Service with Non-Regular Forces (e.g. to attend annual training camps and special courses)		Employees who are members of the Non-Regular Forces may be granted a maximum of two weeks' leave with pay to attend annual camp per annum. Requests may be subject to restriction if multiple applications are received within the same section/area of service, who apply for the same period of time off in order to meet the operational needs of the department.

Serving as a Member at another Local Authority		Leave will be granted with pay subject to statutory limits. There is no set number of days, but the employer should consider reasonable time off. Reasonable Time Off: The amount of time off should be agreed between the employee and employer beforehand, based on: · how long the duties might take · the amount of time the employee has already had off for public duties · how the time off will affect the business The employer can refuse a request for time off if they think it's unreasonable.
Court Appearances	Court Appearance for Civil Matters leave, and pay is at the discretion of the Governing Body.	Leave to attend court as a witness in a criminal action should be treated the same as Jury Service attendance. Any instances involving civil actions should be referred to the Governing Body.
Election Duties		Leave will be granted with pay to any employee who works on a Polling Station or as a Visiting Presiding Officer.

Pension

Local Government Pension Scheme ('LGPS').

If an employee, who is a member of Merseyside Pension fund, is granted unpaid leave of absence, the period will not count for pension purposes unless they elect to pay Additional Pension Contributions ('APCs') to purchase the amount of pension 'lost' during that period of absence.

The amount of pension lost is calculated as the appropriate fraction of the lost pensionable pay for that period of absence (i.e. 1/49th of the lost pensionable pay if

the member is in the main section of the Scheme or 1/98th if the member is in the 50/50 section).

If the employee wishes to purchase the amount of lost pension and makes the election within 30 days of returning to work, the cost of the APC will be split between the employee and the employer (i.e. the school). The employee will pay one-third of the cost and the employer will pay the rest.

This is known as a Shared Cost Additional Pension Contributions ('SCAPC'). These additional contributions can be paid as a one-off lump sum from your pay or for larger amounts a repayment arrangement for payment may be agreed with the employer's payroll and pensions teams.

Employees who have membership of the LGPS before 1 April 2014 will have built up benefits in the final salary scheme and should they choose to pay for the lost pension in the scheme, the amount paid will also go towards covering the protections associated with the pre-1st April 2014 membership.

Teacher Pension Scheme.

Under the Teacher Pension Scheme ('TPS'), any unpaid leave is classed as excluded days and does not count as pensionable employment for the purposes of the Scheme. The TPS does not have the facility to buy back excluded days.

Flexible Working

School recognises the need of its employees to balance their work and personal responsibilities; it also recognises its obligations under the Government's Flexible Working Regulations 2002, the Flexible Working (Amendment) Regulations 2023 (effective from 6th April 2024) and the Employment Relations (Flexible Working) Regulations Act 2023.

This procedure is designed to meet the requirements of the legislation and to provide opportunities for employees to balance their work with their caring responsibilities at home.

Scope

1. The scheme is available to all employees, regardless of length of service, contract type, job role or reason to ask for flexible working.
2. Two flexible working requests can be submitted in a 12 month period.
3. Requests for flexible working arrangements can be made on a permanent basis or for a temporary specified period dependent upon the circumstances of the case but there is a presumption that temporary arrangements will last no longer than one year.
4. All requests must be made in writing on the appropriate form and submitted to the Headteacher at least 2 months before the proposed change. The employee must specify the flexible working pattern requested and the date the employee proposes the change should become effective.
5. All requests, including any appeals, must be decided, and communicated to the employee within a period of two months from when the Headteacher first receives the request, unless an extension has been agreed.
6. To this end, timescales are set out in the policy which if followed, will enable the process to be completed within the prescribed two months.
7. Consideration will need to be given to the time limits where school holidays fall within the 2 months following receipt of a request, and extensions agreed where appropriate to allow for reasonable consultation with the employee and consideration of the request to take place.

8. Time limits may be extended by agreement between the Headteacher and the employee (or other Senior Leader acting on behalf of the Headteacher in the Headteachers absence). In all instances if an extension is agreed, this will be confirmed in writing to the employee.

The Acas statutory Code of Practice on requests for flexible working provides guidance to employers and employees on the statutory right to request flexible working and is recommended to managers. The guide is accessible on the Acas website: www.acas.org.uk

Procedure

1. Requests for flexible working arrangements must be submitted on the appropriate form and submitted to the employees Headteacher for consideration at least 2 months before the proposed change.
2. The Headteacher must arrange a consultation meeting to consider the request and the meeting should take place within 10 working days of receipt of the written request. The employee and Headteacher should have reasonable time to prepare for the discussion, while taking into account the statutory two-month period for deciding requests including any appeal. The Headteacher may seek advice from a member of the Schools HR Team.
3. The purpose of the meeting will be to explore in detail the request and how the proposed working arrangements may be accommodated. If it is considered that the proposals are not practicable alternative arrangements may be explored.
4. Care will need to be taken when considering applications for "uneven" job shares and attempting to meet an existing employee's requirements. The hours and duties of the remaining job will need to be attractive to prospective applicants or difficulties may be experienced in recruiting a partner.

5. Any start date will be dependent on various factors as follows:

- The operational requirements of the School.
- If the job share consists of one person leaving half the job vacant or two partners leaving a whole post vacant.
- The hours and work pattern.
- The employee's domestic circumstances.
- Anticipated period of recruitment.
- These will need to be fully discussed with the employee(s) and a mutually convenient date agreed.

6. Within 10 working days of the meeting the Headteacher must provide the employee with a detailed written response, either:

- accepting the request and establishing a start date. If the application is agreed, such agreement may need to be conditional, e.g. on a suitable job share partner being found.
- confirming any alternative working arrangements discussed or any compromise situation agreed at the meeting;
- providing detailed reasons for the rejection of the request which must be covered by one of the specified 'business grounds' namely;
 - the burden of additional costs; detrimental effect on the ability to meet customer demand;
 - inability to re-organise work among existing staff;
 - inability to recruit additional staff; detrimental impact on quality or performance;

- insufficiency of work during the periods the employee proposes to work;
 - planned structural changes;
- 7. In some circumstances, the Headteacher may need an extended period of time to adequately consider the request and assess the possibility of re-organising working arrangements. Where it is considered that an extended time period will be required this should be agreed at the meeting and confirmed in writing to the employee, e.g. attempts to recruit additional staff . However, a written response can be provided, within 10 working days of the meeting, advising of the arrangements which will be put in place to try and address the situation.

Right of Appeal

1. If the employee is not satisfied with the written explanation and is not satisfied that the business grounds apply to their case, then the employee has the right of appeal against the Headteacher's decision.
2. An appeal must be submitted to the Clerk to the Governors within 10 working days of receipt of the written decision stating their grounds of appeal.
3. An appeal hearing will be arranged and held without unreasonable delay. The meeting will normally take place within 10 working days of receipt of the appeal submission. Where this timescale cannot be met all parties must be advised.
4. The Governing Body Appeals Committee will be advised at the appeal hearing by a member of the Schools Human Resources Team.
5. Prior to the appeal hearing the Governors Appeal Committee will be provided with a copy of the original request and the Headteachers written response.

6. At the appeal hearing the employee will outline his/her grounds of appeal and highlight why he/she feels the Headteacher's "business grounds" for refusing the request are flawed. The Headteacher will outline the reasons for his/her decision.
7. The Governing Body Appeal Committee will consider the case and confirm their decision in writing within 5 working days, taking in to account the statutory two month period for deciding requests. The decision should make clear what has been decided and why. The Governing Body Appeals Committee may:
 - uphold the Headteacher's decision;
 - make proposals/recommendations and refer the matter back to the Headteacher/employee for further consideration;
 - reject the Headteacher's decision and uphold the request
8. No further right of internal appeal exists.

Additional Information

The employee is entitled to be accompanied at all stages of the procedure by a Trade Union/Teacher Associations Representative or workplace colleague.

Changes to the specified timescale must be agreed jointly. If no agreement is reached and the matter has not been dealt with within the specified time limits the employee will be entitled to advance to the appeal stage.

Any Employee wishing to reduce their hours must be aware that, if a redundancy situation arises, a reduction in hours will significantly reduce any redundancy payment and would pro rata any other entitlements under their terms and conditions.

Approved permanent and temporary working arrangements must be confirmed in writing to the employee. All temporary working arrangements must specify the agreed period with the start and end dates clearly stated.

Types of Flexible Working

Job Sharing

Job sharing exists when two people share the hours, duties and responsibilities of one full-time post. It is distinguished from most part-time work by the deliberate division of duties that would normally be the responsibilities of one full-time employee.

Opportunities to share part-time posts may be restricted by the number of hours to be worked and jobs of less than, for example, 15 hours may, in practice, be difficult to share between two individuals. Such applications, however, will be given the same consideration as applications to share full-time posts and the same principles will apply.

Each application will be considered on its own merits, and it will be recognised that circumstances may vary, for example, between one particular time to another.

Compressed Working Week

A Compressed Working Week is an arrangement when normal full-time hours are worked over, for example, four days a week.

"V" Time

“V” time is a term for voluntary reduced working hours and is an arrangement, which allows an employee to reduce their hours and their pay usually for a temporary period for a specific purpose.

Phased Retirement

Where a staff member reduces their working hours to transition from full-time work to full-time retirement. Staff in the Teachers’ Pension Scheme or Merseyside Pension Fund should refer to the rules and policies relating to those schemes if considering applying for phased retirement.

Term-Time Only Working

Term-time only working is a pattern of work that takes place during the term time only. The application may be to work during the terms associated with the employing school, or may be in relation to terms associated with the employees dependants school(s). This is of clear benefit to employees with school age children.

Annualised Hours

Annualised hours working arrangements are when the hours normally worked throughout the year are arranged to a pattern that best suits the employee and the job.

Review of Procedure

The operation of this procedure is subject to review by the Governing Body, which may result in changes, subject to consultation with the Trade Unions.

Appendix 1 Application for Special Leave (SL1)

Name		Employee Number	
Title		Grade	

I wish to apply for Special Leave as follows:

From		To		With or without pay?	
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Reason for Special Leave

(Please provide brief details of circumstances and attach any required evidence)

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Employees Signature		Date	
Managers Signature		Date	

Manager's comments	
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To be completed by Authorising Officer:

Approved or not approved		No. of days with pay		No. of days without pay	
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Authorising Officers signature	
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Appendix 2 Request for Flexible Working Arrangements

Name				Employee Number	
Job Title				Grade	
Current Hours of Work per week		Pattern of Work			
TU Representative			Contact details		
Is this your first flexible working request within the last 12 months?			If no, please detail date last submitted		
Is this request temporary or permanent			If temporary, please specify end date (within 12 months)		

Details of proposed working hours and/or pattern

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Proposed start date of new working hours/pattern	
--	--

If applying for job share, please indicate if this is a joint or single application		If Joint, please name your partner	
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Are you making this request in relation to the Equality Act 2010 e.g. as a reasonable adjustment for a disability?	
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Details of Request:

Please specify the details of your flexible working request.

Print Name	
Signature	
Date	

To be completed by Authorising Officer

Date Received by school		2 month deadline date		Date Ext. agreed until	
Date met Employee		Approved/ Not Approved		Date	

Appendix 3 Acknowledgement Of Receipt Of Flexible Working Request

Employee Name	
Employee Job Role	
Date	

I acknowledge receipt of your request for flexible working arrangements received on <INSERT DATE>. In order to consider your request in detail I have scheduled a consultation meeting to be held on <INSERT DATE> at <INSERT VENUE>. The meeting will take place at <INSERT TIME>. You are entitled to be accompanied at the meeting by your Trade Union/Teacher Association Representative or workplace colleague.

Print Name	
Signature	
Date	

Appendix 4 Letter Template in Response to Flexible Working Request

Private and Confidential

Date

Dear

I refer to the request for flexible working that was received on <INSERT DATE>

Suggested helpful points for the response letter:

- Detail the submitted flexible working application and what the employee has requested. Including whether this request was a temporary or permanent change to the employees' working arrangements.
- Confirm when you met or discussed this request.
- Confirm as Headteacher if you can accommodate all or some of the employee's request. Detailing if the request is agreed on a temporary or permanent basis. If on a temporary basis, detail duration and if any reviews will be set up in the future.
- Provide detailed reasons for the **rejection** of the request which must be covered by one of the specified 'business grounds' namely:
 - the burden of additional costs; detrimental effect on the ability to meet customer demand.
 - inability to re-organise work among existing staff.
 - inability to recruit additional staff, detrimental impact on quality or performance.
 - insufficiency of work during the periods the employee proposes to work.
 - planned structural changes.

You do have the right to appeal against my decision. Any appeal must be submitted to the Clerk to Governors (insert the contact details here) within 10 working days of receipt of the written decision. An appeal hearing will then be arranged with the Governors Appeals Committee.

Yours sincerely

Headteacher