



the unitarians

Staff Handbook

**General Assembly of Unitarian and Free Christian
Churches**

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1. Foreword by Liz Slade, Chief Officer

The General Assembly has existed for nearly 100 years, and our heritage goes back further still.

Our charitable object was set around 20 years ago:

To promote a free and inquiring religion through the worship of God and the celebration of life; the service of humanity and respect for all creation; and the upholding of the liberal Christian tradition.

Our work is guided by that object, which reflects the heritage of what went before, and what the future will come to be. So much has changed just in those twenty years – the positive and negative disruptions brought by the internet, political and cultural shifts, changes in attitudes to religion, and of course clearer certainty of the climate crisis. Alongside this, Unitarian membership has dropped significantly. We are doing the same work that Unitarian leaders have done for decades or centuries, but the way we are doing it has changed.

Our work now must be set in today's context, and that means there will be much change as we find a path for the future of our movement. We all play a role in that, and the way we work together, the values that we exhibit, the ways we bring ourselves to our work will influence the future that comes into being.

This handbook outlines the practical information that supports us in our work, and the legal responsibilities that underpin our roles as employees. It should serve as a place to check our formal responsibilities and rights. How we work as a team is broader and deeper than this handbook can delineate, and is a conversation that I hope we will keep on having, as we find what is needed of us, and as we get to know more of the skills and talents that we each have to offer.

Policies and Procedures are Non-Contractual

The policies and procedures in this staff handbook represent the approach the General Assembly will take to the relevant issues. However, these policies and procedures are not contractually binding and may be changed by the General Assembly from time to time. If statutory provision changes, and our policies are in conflict with statutory provision, then statutory provision will prevail.

Staff Handbook of the General Assembly of Unitarian and Free Christian Churches

Who your Employer is?

Your employer is the General Assembly of Unitarian and Free Christian Churches. Throughout our policies and procedures, we refer to your employer as being the “General Assembly” and we shorten this to “GA” at times.

The General Assembly is governed by an Executive Committee elected by the members of the Movement. The Chair of the Executive Committee is the Convenor.

In practice the General Assembly delegates its powers as an employer to the Executive Committee, who decide what policies and procedures to adopt. The General Assembly Executive Committee delegates to the Chief Officer responsibility for running the General Assembly on a day to day basis and being the main source of guidance and interpretation of the employment procedures and rules.

Executive Committee officers may also take part in any employment procedures.

More details are available on our website:

<https://www.unitarian.org.uk/>

2. Code of Practice on Equality of Opportunity

Foreword

The General Assembly is a liberal religious organisation. The inherent worth and dignity of every human being are central themes in our self-identity and our message to the public. While theological ideas have their important role in defining our institutional boundaries, the core motivations for our communities involve the values of human relationships, justice and freedom as we seek to bring our lives and our world more into harmony with their divine potential. The Code is intended to provide procedural guidance in various employment areas to implement that policy.

The General Assembly is committed to provide a working environment in which the rights and dignity of all of its staff are respected, and which is free from prejudice, intimidation and all forms of harassment.

Equality of opportunity means that in the recruitment, selection, training, appraisal, development and promotion of staff, we will use criteria relevant to the requirements of the post.

Responsibility for implementing this Code of Practice

The primary responsibility in law for ensuring there is no unlawful discrimination rests with the employer i.e. The General Assembly. This responsibility is exercised by the Chief Officer, but it is important that all GA employees understand and support the practical measures taken to promote equality of opportunity. This means that employees themselves must not breach this Code nor do anything which knowingly aids the GA in doing so. Acts of unlawful discrimination, including harassment, shall be treated as disciplinary offences.

Recruitment of Staff

The job specification and person specification should be drafted without unnecessary restrictions. Any restrictions which might have a disproportionately adverse effect on someone because of their sex, sexual orientation, trans gender status, race/ethnicity, marital state, caring or parental responsibilities, age or disability must be carefully reviewed and only retained if such requirements are justifiable in terms of the job to be done.

Consideration should be given as to where the advertisements are placed. Some GA positions will involve formulation or promotion of policy in Unitarian/ Free Christian religious areas; for these positions it is appropriate to require membership of a Unitarian organisation and to limit advertising to the Unitarian press. Other positions do not involve these roles and it is possible that non-Unitarians sympathetic to our work could fill these positions; in this case suitable non-Unitarian media should be considered.

3. Holiday Entitlement and Booking

Annual Holiday

All staff are entitled to five weeks of annual leave. If you work fulltime this is the equivalent to 25 days of holiday. If you work part time, then you will be entitled to holiday equivalent to five of your working weeks. (For example: If you work 3 full days a week, you will receive 15 full days a year of holiday. If you work different hours on different days of the week, your holiday entitlement may be worked out in hours per year equivalent to four of your working weeks.)

Annual leave accrues at the rate of one twelfth of your basic annual entitlement for each full calendar month.

Contract Days

Full time staff are also entitled to an additional 5 contract days. Part time staff will be awarded contract days pro rata to their part time work. Contract days must be used when the Essex Hall office is officially closed at Christmas time. The balance of contract days which will not be required at Christmas can then be booked as holiday in the normal way.

Bank or Public Holidays

In addition, you will not be required to work on statutory public holidays. If you work full time, you will be paid for all statutory public holidays. If you work part time, you will be paid pro rata for statutory public holidays. If you are required to work on statutory public holidays you will take them as days off in lieu at a time agreed with the General Assembly.

Taking and Booking Holiday

Usually, all holiday must be taken during the holiday year to which it applies (1st October – 30th September), no holiday entitlement may be carried over from one holiday year to the next, and any holiday not taken will be forfeited. However, new government guidance due to the coronavirus pandemic in 2020 means that there is some flexibility in this until 2022; staff should speak to their line manager if they wish to carry over holiday from one year to the next.

You may only take holidays and days off by prior arrangement with the General Assembly.

The only circumstance in which the General Assembly can pay you for untaken annual leave is when you leave the employ of the General Assembly. The balance of any accrued but untaken annual leave will be paid with your final salary. If you have taken more holiday than you have accrued to date during the holiday year, the General Assembly can deduct that overtaken holiday from your final pay.

4. Absence due to Sickness Policy

Introduction

Your well-being is important to the General Assembly. If you are unwell, we will do our best to support your return to good health and we know that this may mean you are not well enough to work or you are not well enough to attend the office. However, as a general principle attendance at work is important, as unexpected absence from work inevitably causes disruption to the General Assembly and places additional work burdens on colleagues. The following guidelines are intended to assist you in coping with unexpected or occasional absence and to minimise the effect on the General Assembly.

Notification of Absence

If you are unable to work, you are required to advise your manager of the nature and expected duration of your illness at the earliest possible time and not later than one hour after the normal start time for your work on your first day of sick leave. You must speak to your Manager yourself, unless you are medically unfit to do so, in which case you can ask someone else to do so, as there may be outstanding work issues that we need to clarify. Do not just leave a message on the answer machine.

Medical Certificates

You are also required to complete a Notification of Sickness Form on your first day back at work for any sickness absence of up to 7 days, including weekends. See appendix one. You must provide a medical certificate when you are absent for 8 days or more. If your absence lasts longer than is covered by the first medical certificate, you must obtain a second and, where applicable, subsequent certificates to cover each and every day of your absence. You should make contact with your manager regularly during your illness at intervals agreed in your initial conversation with her/him and must keep your manager informed at all times of your expected date of return. You should share sufficient details about the nature of your illness or injury must be given, along with an indication as to when you are likely to be able to return to work.

You must keep sending in medical certificates to cover the entire length of your absence.

Sick Pay

There are two types of sick pay: Statutory Sick Pay (SSP) and occupational sick pay.

Statutory Sick Pay

The rules relating to Statutory Sick Pay (SSP) are laid down in statute and concern the payments you may receive when you are absent from work through illness or injury for 4 days or more. SSP is payable for a maximum period of 28 weeks but is only payable in respect of your qualifying days (your normal working days). You will automatically receive this payment provided that you meet the criteria laid down by the Department of Work and Pensions and from any other Government source. These criteria include complying with the above notification and medical certificate requirements. Please note that SSP is not normally payable during the first three (3) days of absence due to illness or injury unless the second period is “linked” with a previous period of absence i.e. within 56 days of it, although there are some exceptions to this rule e.g. for the Covid 19 infection. SSP is subject to income tax and National Insurance deductions.

SSP may not be payable where in the reasonable opinion of the General Assembly: -

- you have knowingly entered false information on any form, including a self-certification form.
- you failed to follow the rules set out in this policy; or
- there are serious doubts based on good grounds regarding the circumstances of your absence and/or claim for SSP.

If you have exhausted your entitlement to SSP but remain absent from work, you may be entitled to apply for sickness benefit from the DWP. You should disclose to the General Assembly any payments of sickness benefit which you receive.

Occupational Sick Pay

Once you have completed one year’s service, the General Assembly at its discretion may pay salary for up to a total of three months during authorised sick leave, less any payment due as SSP in any period of 12 months. In exceptional circumstance the General Assembly Executive Committee may authorise payments in excess of three months.

Explanation of Discretionary Occupational Sick Pay

The purpose of paying for sickness absence is to support employees during times of genuine need. The General Assembly wishes to provide much more financial support for employees, with the required length of service, than it is compelled to do by the payment of Statutory Sick Pay (SSP) that provides for small payments, once an employee has been away for four consecutive days. However, we must bear in mind that a more generous approach in order to support the individual on the rare occasions when they are ill, may unwittingly encourage people to take time off when they could in fact be at work. Our policy is to try to tread the fine line between being as supportive as we can, whilst recognising that our resources are finite and that some people, at some time, might take advantage of the generosity when they do not really need it.

The General Assembly's intended "fall-back position" is that it will provide pay for defined periods for sickness absences. However, in order to protect ourselves from possible abuse, the policy has to be expressed as a non-contractual one that the General Assembly can exercise discretion over when it feels it necessary. We will use our discretion with care, but must be able to exercise it, even where you have a Statement of Fitness for Work to cover the absence.

As for SSP occupational sick pay may not be payable where in the reasonable opinion of the General Assembly: -

- you have knowingly entered false information on any form, including a self-certification form.
- you failed to follow the rules set out in this policy; or
- there are serious doubts based on good grounds regarding the circumstances of your absence and/or claim for employer sick pay.

You should be aware that it is unlikely that the General Assembly will make any payments for sickness absence in excess of SSP, in cases where you are absent whilst under investigation or when invited to a hearing. Similarly, payment for sick leave in excess of SSP will not usually be paid whilst you are under notice of termination.

Therefore, any sick pay at a higher level than Statutory Sick Pay (SSP) for staff is paid at the absolute discretion of the General Assembly and in line with the operation of this policy.

Medical Examination

The General Assembly may, from time to time, request that you are examined by a medical adviser nominated by the General Assembly and a report is written by that medical adviser for the General Assembly. You do not have to agree to such a request, and this will be made clear at the time of any such request. However, the purpose of the examination would be to help us understand the nature of your illness and what reasonable adjustments if any would help you return to work and without such a medical report, it may be harder for the General Assembly to know how best to support you.

Conduct During Sickness Absence

In all cases of sickness or injury which necessitate taking time off work, an employee is expected to facilitate a speedy recovery and return to work in accordance with medical advice.

If absent from work due to sickness or injury, an employee is not expected to:

- Participate in any sports, hobbies or social activities which are in any way inconsistent with recovery or which could aggravate the illness or injury, engage in any work

around the home in terms of home improvements or the like where this could aggravate the illness or injury or delay recovery

- Engage in any activity which is inconsistent with the nature of the alleged illness or injury (e.g. carrying heavy shopping bags when suffering from an upper limb injury)
- Undertake any other work, whether paid or unpaid, unless there is medical advice to the contrary.

The above is a non-exhaustive list of examples of activities which are likely to involve a material breach of this policy and which may result in disciplinary action up to and including summary dismissal.

Sickness Whilst on Holiday

If an employee suffers from illness or injury whilst on holiday the General Assembly may, in its discretion, treat the holiday or such parts of it as appropriate as sick leave. In these circumstances, the line manager must be informed as soon as possible, and you should not wait until your return from the holiday. A doctor's certificate detailing the nature of the illness or injury and its expected duration must be obtained and sent to the line manager.

Hospital/Doctor/Dentist/Ophthalmic Appointments

All appointments should be arranged outside working hours wherever possible. If this is not possible, they should be arranged at such time as to cause minimum disruption to service delivery, e.g. during the lunch period or at the beginning or end of the day. The line manager must be informed as soon as possible that an appointment will be necessary. The General Assembly reserves the right to require evidence of the appointment, e.g. an appointment card.

Medical Referral

In cases of long-term sickness, the General Assembly will refer the employee for the medical examination for advice on the nature of the illness, a likely date of return and any rehabilitation advice. This may be to the employee's GP or an independent occupational health organisation. The line manager will then meet with the employee to discuss the advice received, the up to date medical position and any support that is needed.

In cases of particularly long-term absence, it may be appropriate to ask an employee to provide regular medical reports from her own doctor/consultant.

Return to Work

After each episode of absence an employee will be asked to attend a Return to Work Interview (see appendix one) with the line manager to establish the state of health of the employee and any necessary adjustments that may need to be made. Where appropriate, the organisation will seek medical advice on the nature of duties, hours of work and location of work, in line with any medical certificates.

Long term Sickness

During long term sickness absences, the line manager will meet with the employee to review the diagnosis and prognosis and offer any assistance which the organisation may be able to provide. The frequency of these reviews will depend on what is appropriate in the circumstances given the nature of the illness and progress towards recovery/improvement. If meetings are not appropriate, the line manager or Chief Officer will keep in contact by telephone or writing, unless such contact would be detrimental to health.

While the organisation will always seek to help and support the employee, it is difficult for it to do so without information. Managers will keep any information confidential except when it is in the interests of the employee themselves to share the information with those who need to know (e.g. a seriously ill employee seeks to return to work against medical advice).

The employee will be encouraged to make suggestions as to how the organisation can support and assist them. A productive dialogue in such situations is often one of the best ways of ensuring the quickest, safest and most successful return to work.

Dismissal on Medical Grounds

There may be circumstances where it is simply impossible for an employee to return to work as required by their position within a reasonable time scale due to ill health. In these circumstances, the procedure is one of warning the employee that they may be dismissed on medical grounds and consultation with the employee about the prognosis for their return to normal working, what adjustments can be made to support their return to work, which might include alternative positions if they exist and the time scale for their return.

There is a right of appeal if the employee is dismissed.

Appeal Procedure

You have the right to appeal against dismissal on the grounds of ill health. The appeal procedure is set out below:

Any appeal should be sent to the Convenor of the Executive Committee.

The appeal must be lodged in writing within seven (7) working days of receipt by you of the dismissal letter. This must state the grounds of the appeal, i.e. why you think the decision is wrong.

An appeal hearing will be held ideally within fifteen (15) working days of receipt of the appeal notice.

You will have the right to be accompanied at an appeal hearing by a colleague employed by the General Assembly or a trade union representative of your choice. The outcome of the appeal will be one of the following:

- The original decision will be upheld, or
- The severity of the decision will be reduced, or
- The decision will be overturned completely.

Once a decision has been reached, you will be informed of it (and the reasons for it) in writing. The appeal decision will be final.

APPENDIX 1

Medical Absence Self Certification Form

To be completed for absences of up to 7 continuous calendar days, after which a doctor's certificate is required.

You should complete this form in the presence of your manager, immediately upon your return to work after any period of absence due to sickness or injury.

NAME:.....

I certify that I was unable to attend work due to a medical reason

From: (Date)..... To: (Date).....

Total number of working days absence:

I telephoned on the first day of my absence.

The nature of the medical reason for my absence was:

.....

I did / did not consult a doctor. (Please strike out as applicable)

Employee's Statement

I understand that any misrepresentation of the facts will be considered as misconduct and could result in disciplinary action that may include summary dismissal. I agree / disagree with the General Assembly keeping a copy of this form, with details of the reasons for my absence, on my confidential personal file.

Employee's Signature: _____

Dated:

Manager's Statement

I recommend payment for days / I do not recommend any payment for this period.

(Note: Any non-payment might not be seen on your payslip until the next pay month.)

Manager's Signature: _____

Dated:

Return to Work Interview

<p>This form must be completed by a line manager for <i>all</i> sickness absence (including single day and half day absences). Failure to participate in a return to work interview with a manager may result in payment of Occupational Sick Pay and/or Statutory Sick Pay being delayed or withheld. <i>(Weekends and bank holidays on which you were ill should also be included for Statutory Sick Pay purposes)</i></p>			
SURNAME		FIRST NAME	
JOB TITLE			
First Day of Sickness (incl weekends)	/ / 20		Total days for this episode
Day Returned to Work	/ / 20		
Number of episodes in rolling year		Number of days in rolling year	
Are you fit and well enough to work now?			Yes / No / Partially
Has a Fit Note been provided if the employee has been absent for 7 consecutive days (including weekends)			Yes / No
Have you been issued with a Fit For Work note?			Yes / No
Are there any recommendations from your GP to enable you to work?			Yes / No
What was the reason for your absence?			
Have you been absent for the same reason in the past 12 months?			Yes / No
Did you receive medical treatment during your absence?			Yes / No
Are you on any medication that may affect your performance?			Yes / No
If yes what medication			
If there anything that you feel that you should bring to my attention that may assist us to help you manage your health?			

6. Acceptable Computer and Telephone Usage Policy

Overall Statement of Principles

As well as enhancing communications and access to information, email, the internet and telephones have the capacity to be abused and misused, with potentially serious implications for the General Assembly and its staff. We also need to ensure that data about the General Assembly's business and members is kept absolutely secure.

Because of this the General Assembly has adopted the following policy to make staff aware of what use is, and is not acceptable within this organisation, and their own obligations.

Use of these systems is an integral part of the work of our staff. Limited personal use outside of working hours is acceptable, but you should be aware that there is no express or implied contractual right for staff to use the General Assembly systems for any personal reason.

Breach of this policy will be regarded as a disciplinary matter. Serious breaches will constitute gross misconduct warranting summary dismissal. This policy applies to use of systems from our offices as well as from General Assembly owned computers and telephones being used anywhere else. All such use is regarded as the use of business systems. The General Assembly must have access to all parts of the systems at all times to ensure that they are working satisfactorily. As a result, employees cannot expect to have privacy in respect of emails (sent or received), their use of the internet or of telephone systems. This applies even when you do have the permission of your manager to use the systems for personal reasons. You will have no claim that your privacy has been violated if any personal information that you have placed on the system subsequently becomes public.

The General Assembly has established rules and policies to:

- Stop claims of harassment, defamation or discrimination.
- Prevent the creation of binding contracts unintentionally or breaching of confidentiality or third-party intellectual property rights.
- Limit viruses accessing the General Assembly's system
- Limit time wasted on personal use of the Internet, on personal emails and telephone calls.
- Indicate levels of acceptable use.
- Allow employees to raise grievances over the General Assembly's implementation of these policies and concerning other employee's use of the systems.
- The General Assembly is able to, and will from time to time, access, review, log, copy, delete, investigate or audit all systems access and messages, and may disclose this information to organisations outside the General Assembly if deemed appropriate.

Manager's Responsibilities

You are required to familiarise yourself with the policy and adhere to its requirements, in particular with the way in which staff use their email accounts.

Managers are required to ensure that all those working within their area are aware of and understand the policy. This includes ensuring it is drawn to the attention of anyone given access to the General Assembly's systems who is not an employee. (For example, workers who are not General Assembly employees, such as consultants, agency temps, and short-term workers.)

Managers who suspect that abuse is occurring must not instigate any measures to monitor internet and email use without prior reference to the Chief Executive. Before the contents of telephone calls, emails, letters, faxes or messages are inspected, the person who intends to intercept them must receive the written permission of the Chief Executive or their nominated deputy to do so before any interception is started. If the Chief Executive or their nominated deputy intends to intercept them, they must have received the written permission of the Convenor of the Executive Committee before they act.

Breaches of the Policy

Breaches of this policy are treated as misconduct to be dealt with under the Disciplinary and Capability Review Procedure. The following are regarded as gross misconduct normally resulting in summary dismissal:

- Serious neglect or blatant disregard of security. In particular, the giving out of passwords to others.
- Taking or sending confidential data belonging to the General Assembly offsite without the express permission of the Chief Officer.
- Trying to circumvent security measures and procedures in connection with General Assembly data.
- Accessing, downloading or sending offensive material.
- Gaining access to or attempting to gain access to data that you have no permission to see.
- Gaining access to, or attempting to gain access to, internet sites known to contain offensive material.
- Installing unauthorised software on a General Assembly system.
- Tampering with or trying to interfere with the workings of General Assembly owned hardware.

Software

Only legally purchased and licensed software is to be used on General Assembly computers. If any specialist software is required, then its purchase should be agreed by your manager.

The General Assembly provides virus protection and firewall software, but you should be aware that immunity from all viruses cannot be guaranteed. It is the responsibility of each user to ensure that, when opening attached files or downloading data, the programs or data are from a legitimate source.

Hardware

Under no circumstances may any additional hardware be attached to any system without the prior permission of our Network Administrator. This includes accessing or attempting to access the General Assembly's wireless networks using your own computer or any other device.

You are not permitted to allow third parties to use the General Assembly's computing power through distributed computing arrangements.

General

Personal use

The systems are the General Assembly's property and intended for business use. Personal use is permitted only outside your working hours, such as during lunch breaks and after work in strict accordance with the provisions of this policy. You are not expected to come into work out of normal hours to use the General Assembly's equipment. Where misuse is suspected, the General Assembly reserves the right to deny you personal use of its systems.

Never attempt to gain unauthorised access to restricted sites or download information that could bring the General Assembly into disrepute or at risk of legal action for either breach of copyright or because of the subject matter. Employees are required to indemnify the General Assembly against criminal prosecution, if they are found to have used the internet for such purposes.

To the extent that personal use is permitted this must never jeopardise or be to the detriment of the General Assembly's interests, including:

- the efficiency of its systems
- the performance of the business
- legal compliance or liabilities
- incurring costs to the General Assembly
- the General Assembly's reputation
- disclosing information not in the public domain
- your performance of your job.

This means that personal use of computers is expected to be for short periods and infrequently used. Any more usage than this is expected to occur only in extraordinary situations.

Additionally, it is not acceptable to use these facilities in connection with:

- personal gain, including gambling
- personal banking or investment management,
- outside business interests: actual or intended
- external job searches or applications.
- sending multiple unsolicited messages (spamming)
- participating in chain or pyramid letters.
- participating in personal “chat rooms”
- printing of personal text or photographs is allowed to the extent of only one or two sides or images per day.

Any copyright restrictions concerning downloaded information must be noted and observed.

Privacy & monitoring

Internet, email, telephone, fax and mail usage is subject to monitoring and interception by the General Assembly for the following purposes:

- to establish facts for operational reasons when the user is unavailable
- for purposes of compliance with regulatory requirements
- to check or demonstrate that the General Assembly’s standards are being met
- to prevent or detect crime
- to detect and investigate unauthorised use
- to ensure the effective operation of the system
- to comply with national security requests.

This may involve, where appropriate and proportionate to the need:

- monitoring the volume of an individual’s email traffic, inward and outward
- monitoring the timing of an individual’s email transmissions
- monitoring time spent by an individual ‘on-line’ or on the telephone
- monitoring the nature of ‘on-line’ sites visited
- monitoring of the content of outgoing emails
- opening and reading mail or fax documents
- monitoring telephone numbers called or calling-in
- listening to or recording telephone conversations

Where the General Assembly has reason to suspect that a breach of its policies or rules, or other misconduct is occurring, the General Assembly may, in addition identify email senders and addressees, access the content of all emails (without restriction), intercept email transmission, identify and access all websites visited, read letters and faxes and listen to and

record telephone calls. It may, at such a time, declare to all users an “amnesty” period during which time caches of stored data can be declared and cleaned from the system. Allowing such an “amnesty” period does not detract from the General Assembly’s drive to eradicate inappropriate usage and its use of disciplinary procedures in particular cases.

Where the user is unavailable, and the General Assembly considers it necessary for operational reasons, the General Assembly may intercept incoming emails and access the content of emails sent, received and stored. In these circumstances the contents of emails clearly identified as “personal” in the subject line will not normally be accessed.

Personal Internet Use

The General Assembly may monitor the time spent on the internet, as well as the appropriateness of the sites visited. The results of such checks will be reported to managers. The General Assembly may keep records of internet sites visited. Such records will normally be kept for up to 3 months.

You are warned that attempted access to sites of an offensive nature is a breach of General Assembly rules. In addition, it is strictly forbidden to display, print, download or disseminate material from sites, the content of which would be likely to be considered:

- obscene, pornographic, or sexually explicit – such as sites facilitating overtly sexual contacts, selling sexual materials, or displaying images for sexual stimulation
- to encourage hatred – such as sites promoting racism, homophobia, religious intolerance, or political extremism.

In serious cases this will constitute gross misconduct warranting summary dismissal.

Access to the following types of sites is also forbidden:

- Gambling, gaming or entertainment sites.

Security

Entering the system through unauthorised use of a password is akin to physically accessing somewhere using a stolen key, and to impersonating someone. It facilitates a range of abuses, and therefore:

- Passwords must not be disclosed to anyone else.
- You may never log on under any password other than your own.
- If you are working on a file that is restricted access, ensure that the file is closed down before you leave your desk.

Password security is your responsibility. If something is accessed via your password the General Assembly will assume that access was by you.

Viruses

Knowingly or recklessly installing, creating, introducing or proliferating within the General Assembly's system any disruptive virus or code, logic bomb, 'Trojan horse', or other disruptive element will be regarded as gross misconduct, warranting summary dismissal.

To avoid infection by viruses etc. staff must not open email attachments from unknown sources and the following types of files must never be downloaded from the internet or otherwise installed:

- PC games
- Music or video files
- Screensavers
- Other software not essential for the performance of your job.

Bullying and harassment

Email communications including links to unsuitable websites, which have the deliberate potential to cause offence, or to bully and harass people, will be regarded as disciplinary matters. In serious cases these will constitute gross misconduct warranting summary dismissal.

If you receive any such communications, you must tell the sender to refrain from sending them to you. Do not send them on to anyone else, unless you have been given express permission to do so by your manager. Please be aware that they are potentially evidence in a disciplinary procedure or even in extreme circumstances, a criminal prosecution.

Copyright Infringement

Copying previously published documents into emails or transmitting them as attached files may constitute copyright infringement. Note should be taken of any copyright notices or warnings before this is done.

Email

Legal liabilities

Emails, though often considered an informal communication, are a permanent record, are as binding as any other form of business communication and can be used in court proceedings. Their content may defame, libel, breach copyright, and bind under contract. They are also insecure. Therefore:

- Due care must be taken in the drafting of emails, just as with formal written communications.
- The General Assembly's standard disclaimer must never be omitted or amended.
- Confidential content should be encrypted, and its safe delivery confirmed.

All email usage will be logged. Only if it appears that there is a reason to investigate further will the contents of emails be examined. You should be aware that even deleted emails may

be kept on file and that the General Assembly may look at emails that you have deleted for the purpose of detecting abuses of this policy.

Standards and content

Effective emails are short, clear, relevant and polite. Irrelevant emails clog up the system and add to recipients' workloads. Ill-considered wording may cause offence or even constitute bullying or harassment. Consider the following:

- Use meaningful headings.
- Mark personal emails "Personal" in the subject box.
- Consider whether, in the absence of verbal inflections, your words appear terse, impolite or sarcastic: writing in UPPER CASE, underlining or in **bold** apart from using these to indicate headings or emphasis of the odd word is analogous to shouting and should be used infrequently, if at all.
- Using email where face-to-face communication would be the norm may be received as a form of 'cold-shouldering'.
- Never write anything that you would not wish others to read.
- Never send abusive emails.
- Never include content that others might find offensive, including links to such websites.
- Do not send or forward jokes by email that others could consider offensive. Both the original author and the forwarder are responsible for the content.

Mistakes can occur in the addressing of messages. If you receive and/or read a message that was not intended for you, you should immediately inform the sender and delete the message, without using the information or repeating or relating it to others whether in oral, written or electronic form.

Personal emails

Whilst occasional personal use is permitted, such use must be fully in accordance with all aspects of this policy and:

- Outgoing messages must be headed 'personal'
- Recipients must be advised by you that mail they send to you may be accessed by the General Assembly in accordance with this policy.

Please be aware that incoming emails that arrive at work may be opened and read in your absence.

Absence from the Office

During absences from the office employees must use our standardised out of office reply messages.

Housekeeping

There will be some emails that you need to keep in an archive. You should make your own personal folder to archive your emails in.

Security of Information and Data Protection

You should be aware that unauthorised access to General Assembly information by means of a computer is forbidden. Therefore:

- you should not attempt to breach your designated security level to access information via the computer system; and
- if consent of access to confidential information is authorised, you should not relay that information by any means to any other party. This means that you must treat computer reports as confidential and not discuss information about individuals with anyone other than those directly involved.
- The protection of data that relates to any person is a legal requirement. Such data must be obtained fairly and lawfully, held for specific purposes only and not used or disclosed in any way incompatible with these purposes.

Breach of any of the above conditions may constitute misconduct which may render the employee liable to disciplinary action, up to and including immediate dismissal for gross misconduct.

Telephone Usage

The General Assembly's telephone system is provided for business use and you should expect that calls may be intercepted or monitored.

The use of telephones, either personal or General Assembly owned, for personal calls is not permitted during working time, except for receiving urgent and important calls, which are expected to last no more than the time necessary to give and receive simple messages. If you need to make a longer or any international call, then please discuss it with your manager before making the call.

If you wish to use your personal mobile during your lunch break, then please do so in the designated break areas or outside, so that you will not disturb your working colleagues.

Letters and faxes

Please be aware that the same rules apply to data contained on paper as to data in electronic formats. In particular the rules concerning permission to take or send data off-site apply just as strongly. Letters and faxes addressed to you and sent to a General Assembly address may be opened and read in your absence.

7. Confidentiality, Public Speaking Contact with the Media, Copyright and Social Media Policy

The work of the General Assembly often involves extremely sensitive issues and it is to ensure that a consistent message is presented that this policy exists. In order to ensure such consistency, you shall not communicate with the Press, broadcasting or other media confidential information regarding the General Assembly or any of its member organisations, members or employees without the General Assembly's prior written consent. This applies both whilst you are working for the General Assembly and after you have stopped working for it, for whatever reason.

Confidential information is information:

- (a) concerning the business of the General Assembly and which comes to your knowledge during the course of or in connection with your employment or holding office; or
- (b) concerning the business or affairs of any congregation, member or other persons having dealings with the Assembly and which is obtained directly or indirectly in circumstances where the Assembly is subject to a duty of confidentiality.

In the case of confidential personal information provided by individuals you must not divulge it to anyone outside the organisation, without the permission of the person concerned, as well as the permission of the General Assembly. Personal information may be disclosed without permission only if disclosure is required on at least two of the six potential legal bases for disclosure as described in the Data Protection Act 2018.

You shall use your best endeavours to prevent the use, publication or disclosure of any confidential information.

You are advised to consult your manager before accepting any invitation to speak at public events or write articles on matters to do with the General Assembly to ensure that there are no conflicts with your contractual obligations.

You will not (except in the proper course of your duties) during or at any time after termination of your employment divulge to any other person or organisation, or otherwise make use of any confidential information concerning the dealings, affairs or finances of the General Assembly or any of the General Assembly's employees, members or partners. In addition, if you are engaged in confidential work within the General Assembly, you must not divulge such confidential information to other employees not entitled to receive it.

Upon termination of your employment, you will deliver to the General Assembly all passwords, documents and other property belonging to the General Assembly that are in your possession including documents made by you in the course of your employment. For the purposes of this section "document" shall include all data stored on any computer or computer, memory device, tapes of conversations, notes and memoranda.

This restriction shall cease to apply to any information or knowledge that may subsequently come into the public domain other than by way of unauthorised disclosure. Confidential records, documents and other papers, together with any copies or extracts of them remain the property of the General Assembly and must be returned to it on the termination of your employment.

Any breaches of these rules whilst in employment will be regarded as gross misconduct. You might also be liable for civil claims for damages.

When in doubt the concern should be raised with the Chief Officer.

Copyright

The copyright in any work compiled, edited or otherwise brought into existence by you as a scholarly work, produced in furtherance of your professional career, shall belong to you. 'Scholarly work' includes items such as books, contributions to books, articles and conference papers, and shall be construed in the light of the common understanding of the phrase. The copyright of any material produced for your personal use and reference, shall belong to you.

However, the copyright in specific materials produced by you in working time paid for by the General Assembly, and produced, used or disseminated by the General Assembly, shall belong to the General Assembly. If there is any dispute as to whether the General Assembly owns copyright, you must keep all information concerning the disputed materials confidential, whilst it is decided to whom the copyright belongs.

Social Networking Sites and Personal Internet Presence Policy

This policy covers the use of social networking applications by all employees or any other third party in relation to the work of the General Assembly.

The requirements for this policy apply to all users of social networking applications which are used for any purpose and regardless of whether the applications are hosted by the General Assembly or not. They must also be considered where representatives of the General Assembly are contributing in an official capacity to social networking applications provided by external organizations, as well as when making what are regarded as personal posts on any public site.

a) The widespread availability and use of social networking applications bring opportunities to understand, engage and communicate with a much wider audience in new ways. It is important that we are able to use these technologies and services effectively and flexibly. However, it is also important to ensure that we balance this with our responsibilities to the General Assembly.

b) The General Assembly recognises that such sites are useful communication tools and acknowledges the right of employees to freedom of expression. However, employees must be aware that such sites are not private or confidential and that the General Assembly has a legitimate interest in protecting its own reputation and in preventing any abuse of people that might arise from the use of such sites.

c) The purpose of this guidance is to enable our staff to clearly distinguish if what they are doing is acceptable and does not break any of our rules in relation to using these social networking sites. We do this to protect the reputation of the General Assembly, and the reputations of individual employees from being damaged by employees using social networking and personal internet sites inappropriately.

d) **If you can be identified on-line in any way, directly or indirectly, as being connected with the General Assembly, then this policy applies to you.** That is, if there is anything on the web that connects you with the General Assembly this affects you. Not following these policy guidelines could lead to disciplinary action that might include summary dismissal for gross misconduct.

e) Everything posted on the internet is to be regarded as being published in the expectation that it is available to all to view and read. This includes photographs and words. In this respect there can be no expectation of privacy. In practice it is often colleagues who bring postings to the attention of their employer and such action is regarded as proper if those postings seem to indicate a threat to the General Assembly's reputation or interests or are abusive or disrespectful to others.

f) Whilst we can't be there to guide you on every post, tweet or blog, we would expect you to follow these guidelines and advice, in order to protect yourself and the General Assembly's position.

Definition

This guidance applies to "personal internet sites" that are defined as:

- Comments to news items published on-line
- Blogs,
- Online discussion forums,
- Collaborative spaces,
- Media sharing services, for example YouTube
- 'Micro-blogging' applications, for example Twitter
- Library applications, for example Facebook

It does not apply to web pages hosted by the General Assembly as they are covered by separate guidance.

Guidance and Rules

Abuse of these guidelines could lead to disciplinary action that might include summary dismissal for gross misconduct.

This guidance should be read in conjunction with the General Assembly's Acceptable Computer and Telephone Usage Policy. You are reminded that although the contents of emails are not specifically covered by this policy, our Acceptable Computer and Telephone Usage Policy does cover such contents.

1. Postings on any internet site are analogous to printing off words and photos and physically sticking them on a notice board where the whole world read can read them.
2. Blogging, commenting and social networking activities are personal work and must be done in your own time, not during working time.
3. If you make reference to your employment with the General Assembly, or it can reasonably be worked out that you work for us, on a personal internet site as defined above, you will be held responsible for the contents of all subsequent postings on that site. The General Assembly does not accept that there is a "privacy setting" that you can use that renders your postings unreadable. The whole purpose of a personal internet site is that postings are read and even if you think that you have restricted the access to your postings, you have no control over what those who you do authorise to receive your postings, do with the information.
4. If you are posting on a personal site and you identify yourself as working for us, or it can reasonably be worked out that you work for us, you should use a disclaimer such as "*The views contained in these web pages are my personal views and do not represent the views of the General Assembly.*" Otherwise readers may assume you are speaking on behalf of the General Assembly. Using this disclaimer does not exonerate you from following all of the other rules and guidelines of the Policy.
5. Do not use our logo or contact addresses on personal internet sites.
6. Avoid bringing the General Assembly or our work or members or partners into disrepute and do not use your site to comment on, attack or abuse colleagues, suppliers, members or partner organisations of the General Assembly. Do not name anyone. Consult your manager if you are unsure whether the content is appropriate.
7. Do not reveal information which is confidential to the General Assembly or individuals. Consult your manager if you are unsure. Revealing confidential information could be regarded as gross misconduct.
8. Note that the use of copyrighted materials, unfounded or derogatory statements, or misrepresentation can result in disciplinary action up to and including summary dismissal.
9. Do not include contact details or photographs of colleagues without their permission.

10. If you receive press or media contact regarding the content of your personal internet site which might relate to the General Assembly, you must consult your manager before replying. Making any kind of response to the media without consultation is likely to be regarded as gross misconduct.
11. If you are developing a personal internet site or writing a blog that will mention the General Assembly and / or the wider movement, you must let your manager know that you are writing them. Your manager may choose to visit your site from time to time to understand your point of view. This includes your use of sites such as LinkedIn.
12. An official account on any social media website may only be set-up with written consent from the Chief Officer. Setting up a site that purports to be an official publication by the General Assembly will be regarded as gross misconduct.
13. The protection offered to “whistle-blowers” by our public interest disclosure policy does not extend to protecting you from disciplinary action if you publish allegations on the internet. You need to go through the proper disclosure process to ensure protection.
14. Make sure that your online activities do not interfere with your job performance.
15. If in doubt, don't post it. Ask your manager.

Link to Other Policies

Please note there are guidance notes for congregations on suggested Social Media Policy.

8. Expenses Policy

See below for an example of an expenses claim form. These forms are available from the Finance Office

Please affix here receipts and vouchers to the expenses form using sellotape or staples so that they may be easily scanned. Supplementary pages for receipts and vouchers are available or may be photocopied.

You may obscure any of the text on this page but please leave the grey administrative box in the footer clear for scanning

Claim forms may be scanned with receipts and submitted by email or electronically by arrangement. You may also post to Essex Hall or hand them to the person in authority over the cost centre to be debited.

Expenses are routinely paid by bank transfer and are authorised weekly. They will credit your account on the following week, excepting Bank Holidays.

Example of GA Office Expenses Claim Form

Name:		Office Ref	
Address:			
		Post Code	
Email			

Sage	AQILLA	Cost Centre	Details	Mileage	£ Claimed
415000		GA Canteen & Catering			
415010		GA Computer software			
415015		GA Graphic Design			
415050		GA Office Expenses			
415060		GA Photocopying			
415080		GA Staff Expenses			
415090		GA Stationery			
415110		GA Sundry			
415120		GA Telephone			
415150		GA Postage Stamps			
420000		GA Training			
410000		GA Officers Travel public transport or mileage at 45p per mile			
			Total Claimed:		

Signed:		Date:	
Approved:		Date:	

OFFICE	RECEIVED		PAID		REFERENCE	
Contact Us: finance@unitarian.org.uk Telephone: (020) 7240 2384 Dial Through: (020) 7257 9986						

Please advise your bank details if we do not have them. **Do Not** fill in bank details for every claim you make but **Do** if we don't have your sort and account number or need to amend them. Thanks.

BACS	Ac Name		Sort Code		Ac Number	
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9. Appraisals Policy

Introduction

- A formal appraisal system ensures that everyone in the organisation has as a minimum, at least once a year, an opportunity to talk about their work, their development and their relationships with other staff.
- All external research demonstrates that having strong objectives that are reviewed leads to superior performance. Lack of clear objectives means that work and effort are wasted. Having clearly defined objectives enables staff to understand what they need to do to deliver value to the organisation and what would make them suitable for taking on further responsibility. It will be equally important to spell out how objectives are to be achieved. One may also want to set group objectives that an individual needs to contribute to.
- A review of learning that has happened and the identification of proposed learning needs for the future will encourage staff to see how they can develop and thus enhance each member of staff's ability to reach their full potential. It is also a method of encouraging beneficial change through consultation and discussion.

When Should The Appraisal Discussion Take Place?

There is no rule that says that appraisal discussions must take place for all staff at the same time. In fact, many appraisers find it difficult to devote the amount of time that they wish to, when having to concentrate all of their appraisal discussions into a set time period. Therefore, the appraiser and their appraisees can decide when an appraisal discussion is most appropriate, within the context that the appraisal discussion should take place at least once a year.

A formal appraisal discussion should be held at the end of the official probationary period of new starters.

We would suggest that each appraiser decides upon his/her own timetable in conjunction with the Chief Officer. This should be agreed with their staff, together with the dates by which the meeting will have taken place. Many appraisers prefer to hold performance reviews more regularly than once a year.

What Is Actually Discussed at an Appraisal Discussion

Within the overall purposes given above, there can be many different reasons for discussing work with your member of staff. Some of these could be:

- To review whether/ how well an objective has been met, if at all.
- To review how the department is organised.
- Receiving confirmation that they are doing the right things.
- To discuss how to do a job.
- To set objectives for the future.
- To review how well the manager and member of staff are communicating and how effective is their working relationship.
- To consider their working relationships with other members of staff and how these might be improved
- To consider whether they can offer further support to other members of staff
- To assess learning needs.
- To review training done and how the new skills and knowledge can be used.
- To consider how the responsibilities of the position might change.
- To discuss the career aims of the individual.

Not all of these reasons will be applicable for all staff. It is important to give everyone the opportunity to discuss career aims for example if they want to, but it is not appropriate to automatically discuss career aims with everyone.

What Are The Behavioural Ground Rules For The Appraisal System?

We would suggest the behavioural ground rules for an appraisal system are:

- Respect for the individual. The meetings are in private, the areas discussed are handled with sensitivity and information disclosed needs to be treated in a confidential way.
- Mutual respect between the appraisee and the appraiser. This will be evidenced by both parties listening carefully to what the other is saying and trying to understand the world from their perspective
- The emphasis of the process is upon the review and analysis of workplace behaviours and actions in order to learn from them and in order to implement improved ways of doing things.

Procedural Fairness.

This means:

- Giving people sufficient notice of their appraisal discussion. We would suggest at least a week so that they have time to prepare and to mull over the key things they want to say or to discuss. This will also give them time if they want to research a particular training opportunity prior to bringing it to their appraiser's attention.
- Items discussed and action points agreed are minuted and filed on each member of staff's personnel file.
- Having systems in place so that the organisation can track whether all appraisers have carried out their responsibilities for conducting appraisal discussions.
- Transparency – how the appraisal system works is made clear to all.
- After the discussion, the appraisee should be asked to sign the completed appraisal form to agree that these were the points discussed and the action points agreed.

Who Decides What Is Talked About?

There is an official form that needs to be worked through during the discussion. However, this is an opportunity for appraiser and appraisee to discuss anything that seems appropriate in addition. Both the appraiser and appraisee may agree before the discussion what the agenda will be, or they may prefer to leave it more fluid.

This is also an opportunity for the appraisee to discuss their ideas for work objectives.

What Forms Are Involved?

An appraisal form that will form part of the "organisational memory" will be held on staff's personal files and this is the only official form.

There are suggested preparation forms to use.

What Is The Process?

The first thing that needs to be made is the commitment of both sides to meet to review the work and the learning that has taken place. The commitment is two-fold: to a time, and for both to prepare for the meeting.

There also needs to be agreement on the objectives for their work and behaviour. The very first time that an appraisal discussion takes place might be the opportunity to formally prepare objectives for the next year, or they might be prepared by discussion some time

before the first formal appraisal discussion. In the framing of objectives, the job description may be a useful reference document providing it is up to date.

We would suggest that the appraiser fills in the appraisal form in draft prior to the meeting. After the appraisal discussion the appraiser should complete the final copy of the appraisal form. He/ she should then allow the appraisee to read the whole form and give them an opportunity to add a comment before signing the form to say that this was what was discussed, and these are the action points agreed. If the appraisee believes the appraiser has inadvertently forgotten some part of the conversation, this will give the appraiser an opportunity to add a further comment before the form is finalised. Additional notes could be attached to the appraisal form.

A meeting and formal completion of the form should take place at least once a year, more often if both would like it to. The formal review of new starters is essential at the end of the probationary period. Reviews of learning should be a natural part of the review of every piece of work. In the same way that their output's quality and quantity is evaluated, the work process should be evaluated in order to learn how to work even more effectively in future. So, a formal review of work can be carried out at any time, and the learning points noted, but at least once a year the full form should be gone through.

During the meeting: As this is a review of the work and learning of the appraisee they are expected to contribute as much as the appraiser to the conversation and this should be made clear to them. However, the appraiser has the responsibility for the chairing of the meeting.

Whose Responsibility Is It To Ensure That The Review Takes Place?

The overall responsibility for holding the review discussion must lie with the appraiser, but with the co-operation of their appraisee being vital to the process. The responsibility for the success of the review must lie with both the appraiser and appraisee.

Training and Development

An appraisal is an opportunity to consider what training and development would be appropriate, although development should not just be considered once a year. Whilst formal courses short or long can be very helpful in development, there are many other ways for people to develop their skills. For example, considered increasing of responsibility, working alongside a more experienced member of staff on a particular project, coaching sessions to improve skills e.g. IT. Taking time for self- development through reading relevant material can also make a substantial difference to understanding and skill levels.

Managers have to consider the budget implications of training programmes and their cost-benefit to the General Assembly.

10. Policy on Supporting Further Professional, Academic or Vocational Study

The General Assembly wishes to support staff in their quest to develop themselves through further study, if this can be justified through a strong business case that includes measurable outcomes and benefits. If you wish to undertake a course of study with an external provider which will lead to a professional, academic or vocational qualification, then you are invited to discuss this matter with your manager. Your manager will clarify with you how these proposed studies are likely to enhance the role you currently undertake or are about to undertake.

If you can identify both a strong business case and an individual development need that will be met by your pursuing these studies, then the General Assembly will consider offering you some financial support with the following items:

- Examination fees
- Course fees
- Key textbooks and course materials
- Essential course residential fees.
- Professional body student membership fees where it is mandatory for the course of study.

How To Apply

If you wish to apply for support, you need to fill in a form – example at the end of this policy, together with writing an explanatory memo about what you want to do and why. Please return the form to your manager, who will arrange for your application for support to be considered by the Executive Committee of Trustees. Any support offered is entirely at the discretion of the Trustees. There is no contractual right for you to have any support.

Terms and Conditions of Support

If you are offered support it may take the form of either an interest free loan that you pay back over a 12 month period which will be deducted monthly from your salary or a grant of money to cover a proportion of the fees or both. A loan is given for tuition and examination fees on each subject only once. i.e. there will be no repeat loans for tuition for subjects which have been failed. Any loan or grant made will be paid directly to the course provider or relevant external body. The maximum grant award that will be made is £1,000 a year.

The General Assembly reserves the right to ask you to repay the grant if you discontinue your studies, fail your examinations or fail to obtain your qualification within the agreed time period. If you leave the employment of the General Assembly within 24 months of any grant being made to you, you will be asked to repay the whole amount of the grant. If you have had a grant several years in a row to undertake a programme that extends over a number of years, you will only be asked to repay the grants that you have received in the 24 months prior to the date of your termination of employment. The amount outstanding on the loan will likewise be repayable immediately if you leave the employ of the General Assembly. The grant or the outstanding balance of the loan can be deducted from any pay you are owed.

Time Off for Study

In general, you should assume that you will have to complete these studies in your own time outside normal working hours. However, you may request paid time off in order to take examinations and if considered reasonable, this may be authorised. Please discuss these with you manager and write to the Personal Assistant to the Chief Executive with your request.

However, the maximum number of days that you may request as paid study time in a twelve-month period is 5 days. The Human Resource Panel of the Executive Committee of Trustees will consider trying to support you with requests for unpaid leave for examination study. The number of days and details of their timing will have to be justified in each situation and will be considered against the pressing nature of daily duties.

Confidentiality

The General Assembly does not want you to share any confidential items relating to our work with members of any course you attend or any faculty or other staff. If in doubt whether something is confidential please discuss with your manager.

Application Form for Support with Professional, Academic or Vocational Study.

Name

Job Title

Course of Study You Wish to Follow (Give name of course and details of course provider)

Please attach a brief memo explaining why you wish to undertake this course of study now. Include in this explanation how you believe it will add to your skills and improve your capability and performance at work. You also need to explain what time commitments of you the course will require and whether you expect that study will impinge on your normal working day. It is important that you make a clear business case for support stating how these additional skills will advance the work in your department or any anticipated future job role for yourself.

Identify the level of monetary support required and itemise things in the categories shown below

	Amount £ Actual	Amount £ Estimated
Course fees		
Key textbooks and course material		
Essential course residential fees		
Professional body student membership fees where it is mandatory for the course of study		
Examination fees		

Indicate the expected start date of the course.

When would you expect to obtain your qualification?

The General Assembly of Unitarian and Free Christian Churches reserves the right to ask you to repay any grant made, if you discontinue your studies, fail your examinations or fail to obtain your qualification within the agreed time period. If you leave the employment of the General Assembly within 24 months of any individual grant being made, you will be asked to repay the amount of that grant. You will not be asked to repay grants made more than 24 months previously, even if they relate to the same programme. Please see terms and conditions in the Policy on Supporting Further Professional, Academic or Vocational Study. Any amount outstanding on the loan will be repayable immediately if you leave the employ of the General Assembly and can be offset against any remuneration due to you.

Declaration:

I have read and understood the conditions which will be attached to any grant made or interest free loan provided and confirm my agreement to them.

Signature.....

Date.....

11. Family Friendly Policies

Introduction

The following are a suite of policies: Antenatal, Maternity, Paternity, Adoption, Shared Parental Leave, Pension Contributions in relation to Maternity/ Paternity and Shared Parental Leave, Parental Leave, Time Off to Care for Dependents, Time Off for Public Duties and Bereavement Leave.

Antenatal and Maternity

11. 1. Antenatal Time Off

1.1 All pregnant employees are entitled to paid time off for antenatal care as recommended by your midwife or doctor.

1.2 If you wish to attend antenatal classes these should be arranged in your own time. However, if you need to leave earlier than usual to attend them, we shall do our best to accommodate this but may ask you to make up the time at our discretion.

11.2. Unpaid time off to accompany a pregnant woman to an antenatal appointment

2.1 If you are in a “qualifying relationship” with a pregnant woman or her expected child, you will be entitled to unpaid time off during working hours to accompany the woman to two antenatal appointments during one pregnancy, taking up to a maximum of 6.5 hours off work for each appointment.

2.2 You qualify for the right from the start of your employment.

2.3 You have a “qualifying relationship” with the woman or her child if:

- You are the pregnant woman’s husband, wife, or civil partner
- You live with the woman in an enduring family relationship and are not a relative of the woman (parents, grandparents, siblings etc. are not entitled)
- You are the expected child’s father
- You are one of a same sex couple who is to be treated as the child’s other parent where the child was conceived by sperm donation
- You are the potential applicant for a parental order in relation to a child expected to be born to a surrogate mother.

2.4 We are not entitled to see the woman’s appointment card, but we can request a declaration from you of your qualifying relationship with the pregnant woman or expected child, evidence that the purpose of the time off is to attend an antenatal appointment made

on the advice of a registered doctor/midwife/nurse, and evidence of the date and time of the appointment.

2.5 The right to take time off to attend an appointment may be exercised twice per woman with whom you are in a “qualifying relationship”.

2.6 We have the right to refuse the request for time off to accompany where it is reasonable to do so. Such a refusal will be very carefully considered and is likely to be based in the timing, length and frequency of the appointments, for example, where short notice is given for a non-urgent appointment and cover cannot be arranged in time.

11. 3. Notifying us of your Expected Maternity Leave Start Date

3.1 All pregnant employees are entitled to 52 weeks’ maternity leave (26 weeks’ Ordinary Maternity Leave and 26 weeks’ Additional Maternity Leave) that can start before and continue after the birth. You can start your maternity leave at any time after the start of the 11th week before your expected week of childbirth (EWC). (A week starts on the Sunday). You may start it on any day of the week.

3.2 You should tell us at least 15 weeks before your EWC that you intend to take maternity leave and when you intend your leave to start. If you then change your mind about the date of start you should give us 4 weeks’ notice of the new date. We will need to see the form MATB1 that confirms your dates. You will receive this form from your midwife or doctor.

3.3 We will write to you after being notified of your plans to take maternity leave and confirm the date on which you will return to work, if you take your whole entitlement to maternity leave.

Your maternity leave will automatically start the day after you give birth, or on the first day after the beginning of the fourth week before the expected week of childbirth on which you are absent from work wholly or partly because of a pregnancy-related condition or illness.

11. 4 Minimum Length of Maternity Leave

You must take at least two weeks of maternity leave immediately after the birth.

11. 5 Maternity Pay or Maternity Allowance

5.1 If you have been employed for at least 26 weeks by us, at the 15th week before the EWC and earn, on average, more than the minimum for the payment of NI contributions you will receive Statutory Maternity Pay (SMP) from us.

If you do not have 26 weeks of service by us at the 15th week before the EWC, or earn less than the minimum; then you will receive Maternity Allowance directly from the Department for Work and Pensions (DWP), providing you meet their criteria for payment. [In 2020 the Staff Handbook of the General Assembly of Unitarian and Free Christian Churches

key criteria are that you earn more than £30 a week on average over a 13 weeks period and have worked more than 26 weeks in the last 66 weeks.]

If you are entitled to receive SMP you will receive up to 6 weeks at the higher rate of SMP followed by 33 weeks lower rate of SMP, or 90% of your average weekly pay if this is lower than SMP. The higher rate of SMP is calculated as 90% of the employee's average weekly pay. The average weekly pay is calculated over the period from the period starting 8 weeks before the 15th week before the expected week of birth and ending when your maternity leave finishes. SMP is paid through salary as usual and tax and NIC are deducted.

You are only paid SMP for weeks when you do not work, other than if you work 'Keeping in Touch' days (see below) and if you opt to return early your SMP stops.

11. 5.2 Holiday Entitlement

You continue to accrue holiday entitlement at your normal rate for this time.

11. 5.3 'Keeping in Touch' Days

An employer may offer "keeping in touch" days (KIT days) during the maternity leave period and if you work them your maternity leave does not come to an end. We do not have to offer them, and you do not have to accept any offer that is made.

If we offer and you accept more than 10 KIT days during your maternity leave, then officially your maternity leave comes to an end.

'KIT' days do not extend the total length of maternity leave, which remains at 52 weeks.

The calculation of pay for KIT days depends on a number of factors and will be discussed with you at the time.

11. 5.4 Return after Maternity Leave

If you are taking your full entitlement to maternity leave of 52 weeks then you do not need to notify us of your return, as we will already have written to you to inform you of the return date. Employees have a right to return to the same job after maternity leave. There may be some exceptions to this if the employee takes more than 26 weeks' maternity leave and if it is not reasonably practicable for the employer to hold her job open, but she must still be offered a job that is suitable for her and the terms and conditions must be no less favourable.

If you wish to come back before the end of your full maternity leave period then you have to give us notice of at least 8 weeks in writing that you are coming back early unless the General Assembly agrees to less notice being given.

Please note that there is no statutory right to return to work on different terms and conditions, for instance, to change to part-time work. The right to request changes to working time and place of work is described later in this policy.

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11. 6. Adoption Leave and Statutory Adoption Pay

11. 6.1 Eligibility

To be eligible for Adoption Leave and Statutory Adoption Pay (SAP) you must be newly matched by an adoption agency with a child.

Adoption Leave is only available when a child is newly placed, and so is not available for a stepparent adopting a partner's child. The length of leave is the same irrespective of how many children are adopted at the time of placement. It is available for individuals who adopt or for one member of a couple where a couple adopt jointly (the couple must choose which partner takes adoption leave).

The partner of an individual who adopts, or the other member of a couple who are adopting jointly, may be entitled to Paternity Leave and Pay, and/or Shared Parental Leave, both of which are described later.

"Partner", in relation to a child's adopter, means a person (whether of a different gender or the same gender) who lives with the adopter and the child in an enduring family relationship but is not a blood relative of the adopter.

11. 6.2 Statutory Adoption Pay (SAP)

If you are entitled to receive SAP you will receive up to 6 weeks at the higher rate of SAP followed by 33 weeks lower rate of SAP, or 90% of your average weekly pay if this is lower than SAP. The higher rate of SAP is calculated as 90% of the employee's average weekly pay. The average weekly pay is calculated over the period from the period starting 8 weeks before the start of the adoption leave and ending when your adoption leave finishes. SAP is paid through salary as usual and tax and NIC are deducted.

You are only paid SAP for weeks when you do not work, other than if you work 'Keeping in Touch' days (see below) and if you opt to return early, your SAP stops.

If you earn less than the threshold for NI contributions, you are not eligible for SAP. You might be eligible for further financial support from the adoption agency, but there is no adoption allowance scheme payable by the DWP.

You continue to accrue holiday entitlement at your normal rate for this time.

11. 6.3 Adoption Leave

All eligible employees may take 52 weeks of adoption leave, and you may receive Statutory Adoption Pay (SAP) for the first 39 weeks of this period.

The adoption leave starts when the child is placed, or from a date no earlier than 14 days before the adoption is expected. Leave can start on any day of the week.

You should tell us of the expected placement date and when you want your adoption leave to start within 7 days of the adoption agency telling you when the child will be placed with you. At this stage you will produce the matching certificate in order to establish the dates for your leave. You can change your mind on when to start your adoption leave providing you give the General Assembly at least 8 weeks' notice.

The rights to adoption leave and pay are the same whether the child is coming from the UK or from abroad, but there are certain administrative differences in the way that the case is dealt with.

We will write to you after being notified of your plans to take adoption leave and confirm the date on which you will return to work if you take your whole entitlement to adoption leave.

If you are taking your full entitlement to 52 weeks of adoption leave then you do not need to notify us of your return. If you wish to return earlier than this, you must give us 8 weeks' notice of your early return.

You will then return to the job you had before, or to a suitable and appropriate job on terms no less favourable than you had enjoyed.

11. 6.4 'Keeping in Touch' Days

An employer may offer "keeping in touch" days (KIT days) during the adoption leave period and if you work them your leave does not come to an end. We do not have to offer them, and you do not have to accept any offer that is made.

If we offer and you accept more than 10 KIT days during your adoption leave, then officially your leave comes to an end.

KIT days do not extend the total length of adoption leave, which remains at 52 weeks.

As an employer we do not have to offer KIT days and you do not have to work any KIT days we offer. The calculation of pay for KIT days depends on a number of factors and will be discussed with you at the time.

11. 6.5 Right to attend adoption meetings

A sole adopter, who has been advised by an adoption agency that a child is to be placed with them alone for adoption, is entitled to take paid time off work on 5 occasions, for a

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maximum of 6.5 hours per meeting, and a further two occasions of unpaid time off before placement, to attend meetings concerning adoption.

Joint adopters may have, between them, paid time off to attend five meetings, and 2 unpaid meetings. The adopter making use of the five paid meetings must be the primary adopter (the adopter taking adoption leave, rather than paternity leave.)

11.7 Paternity Leave

11.7.1 Paternity Leave and Statutory Paternity Pay

If you are either the biological father, married to the mother, or the mother's partner who lives with the mother or adopter and the child in an enduring family relationship but is not a blood relative, (i.e. you are not 'Grandpa' or "Grandma") who has been continuously employed for at least 26 weeks ending with the week immediately preceding the 14th week before the Expected Week of Childbirth (EWC), you can take paid Paternity Leave (PL) that can last up to two weeks, within 56 days of the actual birth. You must continue to work for us without a break- up to the date the child is born or placed for adoption.

If you prefer and wish to receive normal pay whilst taking time off around the time of birth or adoption placement, you may book holiday in the normal way and we will try to ensure that you can take your leave at the time you wish to. If you wish to take PL, you should provide your manager with a completed and signed form that is found at the end of this policy as evidence of your eligibility to take paternity leave. This is all the evidence that we require.

You must inform your manager of your intention to take paternity leave by:

- The end of the 15th week before the expected week of birth

or

- Within 7 days of being told by the adoption agency that a child is being placed with you.

You must say when you want the leave to start, and whether you wish to take one or two weeks of leave. You can change your mind about when to start your leave but must give us 4 weeks' notice of this new date. Paternity Leave lasts for one or two consecutive weeks. It cannot be taken as odd days.

You can choose to start your leave:

- From the date of the child's birth or placement (whether either are earlier or later than expected),
- From a chosen number of days or weeks after the date of the child's birth or placement (whether either are earlier or later than expected), or

- From a chosen date which is later than the date on which the child is expected to be born or placed with the adopter.

Leave can start on any day of the week on or following the child's birth or placement but must be completed within 56 days of the child's birth or placement.

11. 7.2 Your normal contractual terms, other than pay, continue throughout the period of paternity leave. If your pay is at or above the weekly Lower Earnings Limit for National Insurance, you will receive Statutory Paternity Pay (SPP) during your PL. SPP is paid at a fixed rate per week (determined in legislation) or 90% of your average weekly earnings if that is less provided your average weekly earnings are above the Lower Earnings Limit. It is paid less tax and National Insurance contributions in the normal way.

You have the right to return to exactly the same job, on the same terms and conditions after PL.

11. 8. Shared Parental Leave and Shared Parental Pay

11. 8.1 Introduction

It will be assumed that on the birth of a child maternity/adoption leave will be taken, until such time as the employee confirms that they wish to take Shared Parental Leave (SPL). SPL can only be taken in the first year after the child's birth or placement for adoption.

11. 8.2 Eligibility

SPL can only be taken by two people, who are:

- The mother/adopter and
- One of the following:
 - the father of the child (in the case of birth) or
 - the spouse, civil partner or partner of the child's mother / adopter.

Both partners must share the main responsibility for the care of the child at the time of the birth/placement for adoption.

- It also applies to parents who have applied to the court for a Parental Order following a surrogacy arrangement.
- "Partner", in relation to a child's mother or adopter, means a person (whether of a different gender or the same gender) who lives with the mother or adopter and the child in an enduring family relationship, but is not a blood relative of the mother or

adopter. There are detailed rules that govern who is eligible to take Shared Parental Leave and what written submissions need to be made.

- The mother/adopter/parent who triggers shared parental leave must meet the 'continuity of employment test' – i.e. have worked for us for 26 weeks at the end of the 15th week before the child's expected week of childbirth/matching date and is still working for us at that date.
- The other parent who wishes to share in the leave must satisfy the 'employment and earnings test' – must have worked for at least 26 weeks in the 66 weeks leading up to the child's expected week of childbirth/matching date and earned an average of at least £30 a week in any 13 weeks (2020 criteria and subject to update by the government) .
- Those sharing leave must be either employed or 'economically active' meaning that they must be self-employed for at least 26 of the 66 weeks before the expected week of childbirth (the week beginning with midnight between Saturday and Sunday in which it is expected the child will be born).
- The leave can only be shared with one other person.
- SPL only applies to one child per birth (so multiple births do not lead to increased leave)
- If the child dies before notice of entitlement to SPL is submitted, then no SPL can be taken but if child dies after SPL notice and leave has been booked, then you can still take leave, but no further leave bookings can be made.
- It is your responsibility to check you are eligible for SPL, not ours. We are entitled to rely on the information and declarations provided by you. Deliberately providing false information will be treated as potential gross misconduct, if such a situation comes to light. We only need to check the continuity of employment and earnings criteria regarding the payment of Shared Parental Pay.
- We can request a copy of the child's birth certificate and your partner's employers' details within 14 weeks of receiving the notice of entitlement to SPL.

11.8.3 Arrangements for Taking Shared Parental Leave

Shared parental leave is triggered by the mother (in the case of births) or the primary adopter (in the case of adoption) curtailing their maternity/adoption leave to allow their partner to share the balance of the leave.

It is also the case with shared parental leave that the two parents can choose to take the leave together, or at separate times, *and*

That each can take the SPL in continuous or discontinuous periods. Each parent needs to give at least 8 weeks' notice of their request when to take SPL and the General Assembly

needs to agree the dates with them or may ask them to take alternative dates. The leave can also be stopped and started (three notices booking leave are allowed). The leave can be taken as a continuous block or discontinuous blocks of not less than one week.

In the case of a request to take the leave in discontinuous blocks, we are entitled to a two-week period to discuss with you, alternative patterns of leave. However, the law states that if the employer and employee cannot agree, the employee will be allowed to take their leave in a discontinuous block. This is more generous than maternity/adoption leaves which have to be taken in a single continuous block.

Entitlement is in reality up to 50 weeks leave (equivalent of maternity leave minus the compulsory two-week period of maternity leave after birth, if no other maternity leave has been taken). The actual entitlement will depend on how much maternity leave has been taken.

The notice to request SPL must be in writing and dated, give us at least 8 weeks' notice and set out clearly the period of leave. The exception to this is if the child is born before their expected due date and leave had been booked for after the due date, you can take this same period of leave earlier without having to resubmit another notice, within the 8 week period. If the child is born more than 8 weeks before the due date and no notice has been given, then it should be given as soon as reasonably practicable.

It is possible to vary the allocation of leave if you notify us and your partner's employer in writing and it is signed by both parents to confirm they are in agreement.

11.8.4 What is the Entitlement to Shared Parental Pay?

Pay during the maternity period can also be shared and is known as Shared Parental Pay (ShPP). To qualify the mother/adopter/other parent must also have earned above the 'Lower Earnings Limit' in the eight weeks leading up to and including the 15th week before the child's due date/matching date.

The current rate for ShPP is the same as the current rate for maternity, paternity and adoption pay.

The number of weeks for which ShPP can be paid is 39 weeks less the number of weeks for which maternity pay has already been paid. Thus, the maximum entitlement possible is 37 weeks of ShPP i.e. 39 weeks minus the first two weeks of maternity/adoption pay, which cannot be shared.

Mother/adopter/other parent must have given leave to end their maternity/adoption pay period or Maternity Allowance period. The notice to end maternity/adoption leave will be binding and cannot be withdrawn unless 1) the mother's partner dies, 2) the notice was given before birth and is withdrawn up to six weeks following the birth 3) it transpires within 8 weeks of the mother submitting notice to end maternity/adoption leave that neither parent qualifies for SPL and ShPP.

11. 8.5 Will an employee taking shared parental leave be entitled to return to the same job after the leave has ended?

There is protection of employment rights whilst on SPL and it is the same as the protection in place as for maternity/adoption.

11.8.6 Shared Parental Leave In Touch Days (SPLIT Days)

Employees may also work for up to 20 days for us during shared parental leave, with our consent, without bringing their shared parental leave to end. These are known as Shared Parental Leave In Touch days (SPLIT days). SPLIT days are used where it would be beneficial for an employee to attend a work related or training activity day to help them return to work.

So, one maternity or adoption situation can lead to 10 KIT days and then 2 x 20 SPLIT days = 50 days of keeping in touch = 10 weeks, although the SPLIT days are borne by the employer of each “parent”.

SPLIT days do not extend the total length of your shared parental leave.

The calculation of payment for SPLIT days involves several factors and will be discussed with you at the time.

11.9. Statutory Pension Contributions during Maternity Leave, Shared Parental Leave, Paternity Leave and Adoption Leave

11.9.1 Statutory Pensions Contributions - Overview

The Maternity and Parental Leave etc Regulations 1999 and the Paternity and Adoption Leave (Amendment) Regulations 2014 confirm that employers must provide pension contributions during any period of paid maternity/adoption/shared parental/paternity leave (statutory or contractual.) However, it makes it lawful not to continue pension contributions during any period of unpaid maternity/adoption/shared parental leave. Currently maternity/adoption leave is for 52 weeks of which the first 39 weeks are paid. Therefore, employers do not have to make pensions contributions during the last 13 weeks of maternity leave. Shared parental leave takes over the balance of unused maternity/adoption leave and pay and thus the same principle applies that during any period of unpaid shared parental leave, the employer does not have to make pensions contributions.

When on maternity leave, paternity leave or adoption leave, an employee will remain a member of the workplace pension scheme, unless the employee decides to stop contributing. (N.B. This is not the same as just not making contributions because the

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employee is not receiving pay during some weeks.) If the employee leaves the pension scheme and therefore stops contributing, the employer will also stop their contributions and the employee will be treated as having left the pension scheme.

The employer's contributions during the paid period of maternity/ adoption/shared parental/ paternity leave are based on the employee's pensionable earnings before she/he started the maternity/ paternity/ shared parental/adoption leave period. However, the employee's contributions are based on his/her actual earnings during the maternity/ paternity/ shared parental/adoption leave e.g. statutory maternity/paternity/shared parental/ adoption pay. The employee's contributions will stop during any period of unpaid maternity/ paternity/ shared parental/adoption leave as will the employer's if they so choose.

11. 9.2 Pension Percentage

If the employer's percentage contribution to pension varies according to the percentage the employee contributes, the employee must continue to pay the same percentage level of contributions from their statutory pay, although this will be on actual earnings; if they wish the employer's contributions to continue at the same percentage rate of their pensionable earnings before the maternity/adoption/ paternity/shared parental leave.

11.9.3 Unpaid Leave (such as Parental Leave)

Parental leave is unpaid, and the employee does not need to continue contributing during the period of unpaid leave. The employer may also cease contributing during parental leave.

11.9.4 Tax and NI on Maternity Pay

Statutory maternity/paternity/ adoption/shared parental pay is subject to tax and NI in the normal way, although the rate of pay is unlikely to attract tax/ NI. Income tax is calculated under PAYE rules on a year to date basis, not just on what you have earned in any one month. Therefore, most people on the basic rate of maternity / shared parental leave /adoption pay end up with a tax rebate.

11.10. Payment For KIT (Keeping In Touch) / Shared Parental Leave In Touch Days (SPLIT)

11.10.1 Payment for the KIT Day

If an employee works on a KIT/SPLIT day during a period when they are not receiving statutory maternity/ adoption/shared parental pay, i.e. during the last 13 weeks of maternity leave, then they would receive normal pay for that day. If they work for part of a day, they should receive pay prorata e.g. half a day's pay.

If the employee works on a KIT or SPLIT day during a week when they are receiving statutory maternity/ adoption/shared parental pay, then the employer only has to make an additional payment. For example, if an employee works on two KIT days in one week and their normal pay for those days would be £100 per day. The current weekly basic rate of SMP (from 5.4.20) is £151.20. The employer could choose to just make an additional payment of £200-£151.20 = £48.80 for those two KIT days. So, in total the employee would receive £151.20 SMP and a further payment of £48.80 i.e. an overall total of £200 for the week.

For example: If the employee only worked one KIT day during that week, and their normal rate of pay was £100 per day, the employer could choose to make no additional payment because £100 is less than their SMP weekly rate of £151.20.

11.10.2 Pension Contributions on KIT/ SPLIT Days

Employee: Pension contributions at the employee's normal percentage contribution should be paid by the employee on actual pay during maternity/ shared parental/adoption leave. Therefore, if working KIT/SPLIT days leads to increased pay, pension contributions at their normal percentage should be levied on all actual pay received by the employee.

Employer: However, pension contributions for KIT/SPLIT days should only be paid by the employer if the KIT/SPLIT days fall in the last 13 weeks of maternity leave, when no other pension contributions are being made by the employer. The pension contributions by the employer are in relation to the actual pay for the KIT/SPLIT day(s) worked and not in relation to the normal salary.

11.11 Annual Leave At The End Of Maternity/ Adoption/ Shared Parental Leave

Please note that when an employee finishes maternity/adoption/shared parental leave, he/she may choose to take some accrued holiday leave before returning to the workplace. This holiday pay is at the normal rate of pay. Pension contributions from both the employee and employer should recommence in the normal way.

11. 12. Parental Leave

11.12.1 Right to Parental Leave

Parental leave is the right to take time off to look after a child or make arrangements for the child's welfare. The right to parental leave entitles all eligible employees who have completed one year's qualifying service to take a period of unpaid and non-pensionable leave to care for each child. The right applies to mothers and fathers and to a person who has obtained formal parental responsibility for a child under the Children Act or its Scottish equivalent. Parents are able to start taking parental leave as soon as the child is born or placed for

adoption, or as soon as they have completed the required one year's qualifying service with their employer, whichever is later.

Parental leave is separate from the right for all employees, men and women, to take emergency leave to deal with unexpected incidents involving their children or other dependants.

Each parent can take 18 weeks' parental leave for each child. This means that both mothers and fathers, if they have twins or adopt more than one child at a time, can take 18 weeks' leave for each child.

One week's parental leave is equal to the length of time that an employee is normally required to work in a week. This means that a week's leave for an employee who usually works from Monday to Friday is equal to five days, while for an employee who works Mondays and Tuesdays only, a week's leave is equal to two days.

In summary a parent is entitled to take unpaid leave subject to these conditions:

- You have a right to take off in total 18 weeks' parental leave for each child before the child is 18. Parental leave must be taken in as a block of one week or multiples of complete weeks.
- You have a right to take off in total 18 weeks' parental leave for each disabled child (defined as a child for whom disability living allowance is being paid) before the child is 18, and this time may be taken off in single days.
- A minimum of 21 days' notice must be given before the start of the leave unless the General Assembly agrees to a shorter notice period.
- You can be asked to provide evidence of parental responsibility. This evidence could be the child's birth certificate, papers confirming a child's adoption or the date of placement for adoption or in the case of a disabled child, a record of disability living allowance award for the child.
- The employee will remain employed while on parental leave; some terms, such as contractual notice and redundancy terms will still apply.
- Where the leave is taken for a period of four weeks or less and is either an isolated period of leave or the last of two or more consecutive periods of leave which did not include any period of additional maternity leave or additional adoption leave the employee will be entitled to go back to the same job;

in all other cases, an employee returning to work after parental leave of more than 4 weeks, or after consecutive periods of family leave which included additional maternity leave, or additional adoption leave, he/she is entitled to return to the same job as before, or if that is not reasonably practicable to another job which is suitable and appropriate;

11. 12.2 Parental Leave is Unpaid

You will not be paid during parental leave or receive employer pension contributions. Your pension payments will also be suspended during periods of unpaid parental leave. You will continue to accrue holiday entitlement during the whole of your parental leave period and will continue to receive any other benefits that you had. The purpose of parental leave is to enable parents to care generally for their child(ren). Parents may use it to spend more time with their children and strike a different balance between their work and family commitments. The reasons for leave need not be connected with the child's health. Parental Leave will be taken in blocks of time agreed with the individual's manager in light of the nature of the individual's work and up to a maximum of four weeks in any one year unless the General Assembly agrees you can take more in one year. The dates of parental leave will be approved by the employee's manager, subject to service needs. The employee should give as much notice as possible (at least 21 days' notice) of their request for parental leave. The manager may exceptionally require an employee to postpone their parental leave (except where it is planned to be taken at the birth or adoption of a child) for a period of up to six months, if the needs of the General Assembly require them to do so.

11.13. Time Off To Care For Dependants

11.13.1 Legislative background

The Employment Rights Act 1999 gives a right to every employee, regardless of length of service, to take a reasonable amount of unpaid time off work "to take action which is necessary" to help when a dependant gives birth, falls ill or is injured or assaulted.

A "dependant" in this context means spouse or civil partner, partner (including same-sex partner), child or parent of the employee or any member of the employee's household who is not their employee, tenant, lodger or boarder. Where time off is to take necessary action to help when a dependant falls ill or is injured or assaulted, the definition extends to "any person who reasonably relies on the employee for assistance" on such an occasion. In all cases, the right is limited to the amount of time that is reasonable in the circumstances of the particular case. In most cases, whatever the problem, one or two days will be the most that is needed to deal with the immediate issues and sort out longer-term care arrangements if necessary.

11. 13.2 Who is eligible for Time off to Care for Dependants?

Time off to care for dependants will be granted to all employees, regardless of length of service. The policy applies to all staff who have caring responsibilities for dependants such as

- employee's own child(ren)
- next of kin or nominated next-of-kin
- partners

- parents/parents of partners

There is no set limit to the time or number of days which can be taken. However, in most cases, the amount of leave will only be one or two days at the most. For example, if a child falls ill, the leave should be enough to help you cope with the crisis, to deal with the immediate care of the child, visit the doctor if necessary and to make longer term care arrangements. It would not mean you may take two weeks off to look after the sick child yourself, except in exceptional circumstances.

You are expected to make contingency arrangements for caring for your dependants that will allow you to work if your primary care arrangements are not available. It is also expected that your partner, if you have one, also exercises their right to take to take time off work for dependants in equal measure with you, if the person is also their dependant. You should expect to be asked by your manager about these measures to avoid you needing to take time off when you ask for time off to care for dependants. It does not imply that you are not believed but is aimed at ensuring that we do not suffer unduly from being a more caring employer than others.

11.13.3 Applying for Time Off to Care for Dependants

Where an unforeseen situation arises, the employee should contact the Chief Officer as early as possible to inform them of the problem and request leave. You must keep in regular contact all the way through the time off and let the Chief Officer know when you expect to come back.

11.14. Leave For Public Duties

The General Assembly recognises that certain of our employees may, at some time, require time off from work to perform specified public duties. Such duties may include, for example, acting as Justice of the Peace, or as a Member of a Local Authority, jury service, military service or some other duty. The General Assembly will observe its statutory responsibilities in relation to the approval of such leave.

11.15. Bereavement Leave

11.15.1 Statutory Parental Bereavement Leave & Pay

From 6 April 2020, parents who have tragically suffered the loss of a child under 18 years or suffered a stillbirth will be entitled to two weeks' Statutory Parental Bereavement Leave and, if they have 26 weeks' service, to statutory bereavement leave pay as well.

The right to parental bereavement leave

The new right will apply to employees who have suffered the loss of a child under the age of 18 years old or suffered a stillbirth from 24 weeks of pregnancy from 6 April 2020. Parents can take up to two weeks' leave, either in one block of two weeks or in two blocks of one week, within 56 weeks of the child's death.

The right to take two weeks' unpaid bereavement leave will apply to all employees from 'day one' of employment.

Who is eligible for parental bereavement leave?

The right applies to parents, adoptive parents, intended parents, and the partner of any of these individuals as well as foster carers, employees with day to day responsibility for the child (who are not being paid for such care) and employees who expect to be granted a parental order in respect of the child.

Who is eligible to be paid for parental bereavement leave?

Employees with at least 26 weeks' continuous service, who meet the minimum earnings criteria and provide the proper notice (see below), will also be entitled to be paid Statutory Parental Bereavement Pay (SPBP) during their bereavement leave.

SPBP will be paid at the same rate as statutory paternity pay, i.e. £151.20 per week (from 6 April 2020) or 90% of weekly earnings if lower.

On a discretionary basis the General Assembly provides full pay for up to 5 days to all employees who suffer parental bereavement. This means that for the first week of parental bereavement leave, the GA will on a discretionary basis make up the difference between SPBP and full pay.

Do employees need to give notice to take parental bereavement leave?

Yes. The notice requirements for parental bereavement leave differ according to when the employee is taking the leave:

- Leave taken within 56 days of the child's death: the employee must provide notice to the employer before they are due to start work on their first day of absence or, where that is not possible, as soon as reasonably practicable.
- Leave taken between 56 days and 56 weeks following the child's death: the employee must provide a week's notice to the employer.

When giving notice of their intention to take bereavement leave, the employee must provide the date of the child's death, the date on which they would like their absence to begin and confirm whether they are intending to take one or two weeks of leave. They are not required to provide a copy of the child's death certificate.

Are further notice requirements needed for Statutory Parental Bereavement Pay?

Yes. In order to receive SPBP for the bereavement leave, the employee must also give written notice to their employer. This notice should be given within 28 days of taking the bereavement leave or, where that is not possible, as soon as reasonably practicable. When giving notice, the employee must provide their name, the date of the child's death and a declaration that they meet the eligibility criteria to receive SPBP.

Does the entitlement differ if an employee loses more than 1 child?

The employee is entitled to parental bereavement leave in respect of each child.

Does parental bereavement leave affect maternity or paternity leave?

No, taking bereavement leave will not affect entitlement to maternity or paternity leave, which should be available to employees in the event of a stillbirth from 24 weeks of pregnancy.

11.15.2 Other Bereavements

Employees may be granted up to a total of 5 days paid time off following the death of any of the people listed below:

- own child who is over 18 years (see above for still births and children under 18 years of age)
- partners (including same-sex partners)
- parents
- parents of partner, if the employee is responsible for funeral arrangements

Employees may be granted up to 2 days paid time off following the death of an immediate close relative not listed above.

These provisions are not meant to limit the manager's discretion as each request for such leave will need to be judged on the circumstances of the cases.

APPENDIX A FAMILY FRIENDLY POLICIES

Forms For Paternity And Shared Parental Leave

Form to be completed by an employee who wishes to take Paternity Leave after a birth or adoption

My wife / partner is expecting a baby on (date)

OR

The child was born on (date)

(delete as appropriate)

I would like to start my Paternity Leave and Paternity Pay on

(date)

I want to be on leave for one week / two weeks (delete as appropriate)

Your declaration:

I declare that:

- I am in an enduring family relationship with the mother of the child
- I will be responsible for the child's upbringing
- I will be taking time off to support the child's mother, or care for the child.

Signed:

Name:

Date:

Form 1: Mother's Notice Of Intention To Take Shared Parental Leave

Your Name:

Please complete this form and submit it with your partner/ the child's father's declaration no later than 8 weeks before the date on which you wish your first period of Shared Parental Leave (SPL) and Shared Parental Pay (ShPP) to begin.

Note: You will need to complete a separate notice to take each particular period of SPL once you have submitted this form. This notification is not binding and may be varied by you completing the variation form any time up to 8 weeks before you wish to take a period of SPL.

Child's father's or your partner's name:	
Statutory Maternity Leave (SML) taken or due to be taken by you:	From: To:
Total amount of SPL and ShPP available to you	Total: weeks
Expected week of childbirth: Actual date of childbirth (if known yet):	
How much SPL and ShPP do you and the father/ your partner plan to take? Please specify how many weeks you each plan to take:	Total: weeks You: weeks Father/partner: weeks
Please indicate when you intend to take SPL(including start and end dates please)	

Your declaration

I satisfy the conditions entitling me to take SPL.

All the information given in this form is correct.

I will immediately inform you if I cease to care for the child.

Signed.....

Date.....

Form 1 Continued: Mother's Notice Of Intention To Take Shared Parental Leave

Declaration to be signed by the father of the child/ your partner

Name	
Address	
National Insurance Number	

- I satisfy the employment and earnings test* and will have main responsibility for the child (apart from the mother)
- I am the father of the child, or the person who is married to, or the civil partner, or the partner of the mother
- I consent to the amount of leave and pay the mother intends to take, and
- I consent to the mother's employer processing the information in this declaration

Signed.....Date.....
.....

*To qualify for SPL you must satisfy the employment and earnings test i.e. you must have been employed or self-employed for at least 26 weeks in the 66 weeks before the baby is born and you must have earned an average of £30 in 13 of those 66 weeks [2020 criteria].

Form 2:

Father/ Partner's Notice Of Intention To Take Shared Parental Leave

Your Name:

Please complete this form and declaration and submit it with your partner/ the child's mother's declaration, no later than 8 weeks before the date on which you wish the first period of Shared Parental Leave (SPL) and Shared Parental Pay (ShPP) to begin

Note: You will need to complete a separate notice to take each particular period of SPL once you have submitted this form. This notification is not binding and may be varied by you completing a variation form up to 8 weeks before you wish to take a period of SPL.

Child's mother's or your partner's name:	
Statutory Maternity Leave (SML) taken or due to be taken by you:	From: To:
Statutory Maternity Pay (SMP) or Maternity Allowance (MA) received or due to be received by the mother	
Total amount of SPL and ShPP available to you	Total: weeks
Expected week of childbirth: Actual date of childbirth (if known yet):	
How much SPL and ShPP do you and the father/ your partner plan to take? Please specify how many weeks you each plan to take:	Total: weeks You: weeks Father/partner: weeks

Please indicate when you intend to take SPL (including start and end dates please)	
---	--

Your Declaration

- I satisfy the conditions entitling me to take leave
- I am the father of the child, or the person who is married to, or the civil partner, or the partner of the mother
- I will notify you immediately if I cease to care for the child or if I am notified by the mother that she has not curtailed her SML, SMP or MA period
- All the information given on this form is correct

Signed.....Date.....
 ...

Form 3: Notice To Vary A Period Of Shared Parental Leave

Please complete this form to notify us of your request to vary a particular period of Shared Parental Leave (SPL)

- You may vary the start or end of any period of SPL
- Ask for a single period of leave to become discontinuous or vice versa
- Cancel completely or vary the amount of leave requested

At least 8 weeks' notice of any variation to an SPL period must usually be given but this may be waived depending on the reason for the request to vary.

Name:

Periods of SPL already notified and agreed:	
Cancellation of a period already requested	Yes/no
Dates of period(s) to be cancelled	
Variation requested: <i>Please detail including any changes to the requested dates. If your request is opt change a period of continuous leave into a period of discontinuous leave, please set out the detail of the pattern of leave, you would now like</i>	
Reason for request:	

Signed.....Date.....
...

Form 4: Variation Of Notice Of Intention To Take Shared Parental Leave

Your Name:

- If you wish to vary the notice of your intention you have already submitted, please complete the form and submit it no later than 8 weeks before the date on which you wish your first period of Shared Parental Leave (SPL) and Shared Parental Pay (ShPP) to begin.
- Note: If you haven't already, you will need to submit a separate notice to take each particular period of SPL, once you have submitted this form.

Please indicate your revised SPL dates including start and end dates for each period of leave	
Please set out the dates of particular periods of SPL already notified	
Please detail any weeks during which you now wish to be on SPL and receive ShPP which were not in your previous notice of intention	

- I agree to this variation

Signed by the mother/ primary adopter

Date

Signed by the father/ joint adopter

Date

- I satisfy the employment and earnings test* and will have main responsibility for the child (apart from the father or my partner)
- I consent to the amount of leave and pay the father, or my partner intends to take, and
- I consent to the father's/ my partner's employer processing the information in this declaration
- I will immediately inform the father/ my partner if I have not curtailed my SML, SMP or MA period

Signed.....Date.....

Form 5: Notice To Take A Particular Period Of Shared Parental Leave

Please complete this form to notify us of your request to take a particular period of Shared Parental Leave (SPL)

Please note that you must have completed the Notification of Intention to take Shared Parental Leave Form before you can make a request for a particular period using this form.

At least 8 weeks' notice of any SPL period must usually be given.

Name:

1. Notice of a Period of Continuous Leave

Start Date:	
End Date:	

2. Notice of a period of discontinuous leave

Start Date:	
End Date:	
Periods of SPL within these dates	
Number of weeks of SPL to be used	

Signed.....Date.....

To qualify for SPL you must satisfy the employment and earnings test i.e. you must have been employed or self-employed for at least 26 weeks in the 66 weeks before the baby is born and you must have earned an average of at least £30 in 13 of those 66 weeks [2019 criteria].

11.16. Requests For Flexible Working

11.16.1 Eligibility

1.1 The right to request to work flexibly is available to employees who have worked for us for 26 weeks or more when the request is made.

1.2 The right is to make a written request and to have the request considered by the employer, who has to provide written reasons to the employee if the request is rejected.

1.3 Only one such request can be made in a 12- month period.

11.16.2 What Can Be Requested

2.1 Eligible employees will be able to request any or all of:

- A change to the hours they work,
- A change to the times when they are required to work (This covers all kinds of working patterns.)
- To work from home for all or part of their working time.

2.2 The variations of the terms are to be permanent, unless the two sides agree that they will change again at some time in the future.

11.16.3 How To Proceed With A Request

3.1 Please write to the Chief Officer setting out the changes that you wish to request, confirming that you wish to vary your hours, times or to work at home for all or part of the time. You also need to analyse any implications of the changes and what effects they might have on the General Assembly, and how these effects can be accommodated. A request letter should contain the following information:

- Confirmation that you wish to vary your working practices and are making a statutory request, with the date of any previous formal request that you have made.
- The changes that you are requesting.
- What the issues that arise from this request might be for us and how the request might be accommodated.

3.2 The General Assembly has developed a form that you may wish to use the form at the end of this section (Appendix B) in order to make a request. This is to help you to make sure that you cover all the areas that you will need to tell us about, and you may write a letter instead of using the form. However, the request needs to be in writing if we are to consider it fully.

11.16. 4. How The General Assembly Has To Respond, And The Appeal Process

4.1 After receiving the written request from you, we will either agree to the changes exactly as you suggest, or we would normally suggest that we meet with you to discuss the request. In the alternative we may suggest a telephone conference call. If we agree a date to meet, then you can be accompanied at this meeting by another employee of ours, if you wish. If you fail to attend two pre-arranged meetings without good reason, we can regard the request as being withdrawn.

4.2 After the meeting or telephone call taking place, we will write to you to either agree the new pattern and when it will start from, or to provide a written explanation of the grounds on which the request is being rejected. The letter will also tell you that you have the right of appeal against the rejection decision. If you do appeal, we will normally hold an appeal hearing and then inform you of the outcome of the appeal.

4.3 The grounds on which an employer can reject a request are:

- The burden of additional costs
- Detrimental effect on ability to meet our service needs
- Inability to re-organise work among existing staff
- Inability to recruit additional staff
- Detrimental impact on quality
- Detrimental impact on performance
- Insufficient work during the periods the employee proposes to work
- Planned structural changes.

4.4 We might suggest to you that a trial period is undertaken for both sides to assess the impact of the changes, prior to both parties deciding if they wish to continue with the planned changes.

Form to Request Flexible Working Hours

1. NAME:
2. TO THE EMPLOYER
<i>I would like to apply to work a flexible working pattern that is different to my current working pattern under my right provided under Section 80F of the Employment Rights Act 1996. I confirm I meet each of the eligibility criteria as follows:</i>
<input type="checkbox"/> I have worked continuously as an employee of the company for the last 26 weeks <input type="checkbox"/> I have not made a request to work flexibly under this right during the past 12 months Please add <i>date of any previous request to work flexibly under this right</i> []
3. CURRENT WORKING PATTERN
Describe your current working pattern (Days/Hours/Times Worked):
Describe the working pattern you would like to work in the future (Days/Hours/Times Worked):
I would like this new working pattern to start from: [/ /]
4. IMPACT OF NEW WORKING PATTERN

I think this change in my working pattern will affect my employer and colleagues as follows:

5. ACCOMMODATING THE NEW WORKING PATTERN

I think the effect on my employer and colleagues can be dealt with as follows:

Name:

Date:

Notes

You are welcome to attach a letter or email to this form so you can write in as much detail as you think will be helpful.

12. Computer Use And Eye Testing Policy

If you use display screen equipment as a significant part of your normal work you are able to request your employer for support to take an eye test to assess whether you need assistance with your vision to enable you to use the equipment in a way that is most healthy for you. You are not required to take an eyesight test if you do not wish to. As a guide, if you are looking at display screen equipment at least a third of your working day then this policy applies to you.

The GA will support this process by giving you paid time off work to attend the testing, for which it will pay the fee if there is any, and also pay for the spectacles necessary for computer use. Further details on both areas are given below.

As far as we are aware from taking specialist advice, working with computers does not cause eye damage, promote eye diseases or make existing vision defects worse, but it might make you more aware of them, as you may experience temporary visual fatigue after prolonged use. For this reason, we give below several precautions to reduce eye strain.

Eyesight tests

Before you take an eye test you should enquire at a local registered optician as to the cost of such a test that is appropriate for testing eyesight to use computers and inform your manager of the cost involved. With their permission you may then be given paid time off to take the eye test and the full cost of the test will be reimbursed to you by the GA.

Tests can be taken with the support of the GA as frequently as your optician recommends. This is usually no more than once every two years, but in special cases may be more frequently.

Spectacles

Where spectacles are prescribed because they are required for computer use, the GA will pay for them. The cost reimbursed will be the minimum required for the spectacles needed to correct intermediate distance vision defects (normally 50 – 60 cm). The GA will not pay for special treatments such as tints or bi- or vari-focal lenses, unless the optician has indicated that they are needed for medical reasons for computer use. It might be that you wear spectacles to correct other vision deficiencies and that those spectacles are not best suited to computer use. In such cases the GA will pay for basic spectacles for you that enable you to use a computer.

Where the spectacles are used more generally than for computer use, the GA does not make any reimbursement of costs beyond the provision of the least expensive pair of spectacles that would correct your computer vision. This is unlikely to be more than £30. In theory, if the spectacles are needed for computer use only, there is no limit on the cost that the GA will reimburse you for the necessary lenses; but the frames will always be limited to the least expensive ones available.

Reimbursement of costs is made only where prior authorisation was given for the testing and the provision of spectacles. The ga does not contribute towards the cost of existing spectacles.

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You will be expected to be responsible for the care of the spectacles and the ga will only pay for replacements of damaged ones in exceptional circumstances.

The ga does not contribute to the cost of contact lenses as these are to correct vision at all distances, and not just limited to intermediate distances applicable to computer use.

Precautions to assist reduce eye strain

Short frequent interruptions are more satisfactory than occasional interruptions to computer use. That is, a 5–10 minute break after 50–60 minutes use is better than a 15 minute break after two hours of work.

Many people slow down their blink rate when working at a computer. This is one of the things which can cause dry eyes which in turn leads to eye fatigue. The purpose of such breaks is to avoid the onset of fatigue rather than to recuperate and hence interruptions should occur before the onset of fatigue.

An “interruption” in computer use is the opportunity to do other work that does not rely just on intermediate vision. Taking a break from computer use is not the same as taking a break from work.

Take action to avoid excess glare on the screen and adjust the brightness and contrast to the most comfortable setting. Look at the screen when it is turned off: can you see any lights reflected in the computer? This will give you an indication of whether you may have a glare issue.

Most people find 45-60cm is the best distance to work from the screen. In general, it is likely to be more comfortable to look down slightly on a screen, so that the eyes are about 15-20 cm above the centre of the screen. The screen should be tilted back slightly.

If you are working on hard copy, place papers on both the left and right of the keyboard, rather than always just on one side.

13. Health And Safety Policy

Our policy is to provide and maintain safe and healthy working conditions, equipment and systems of work for employees and to provide such information, training and supervision as needed for the purpose. The General Assembly also recognises and accepts its responsibilities for the health and safety of others affected by our activities.

It is the policy of the General Assembly to consult its employees regularly in respect of their health and safety generally and specifically where individual duties and responsibilities are required. The General Assembly will also employ specialist contractors as and when required by the nature of the works.

Employees are expected to conform to the policy and comply with the Health & Safety at Work etc Act (1974) in exercising all reasonable care for their own health and that of others who may be affected by their actions. If employees are concerned about any issues, these should be brought to the attention of their manager at the earliest opportunity.

In recognition of the above and in order to achieve the highest standards of health and safety for all those affected by the General Assembly's activities, the General Assembly will ensure so far as is practical that:

1. Safe methods of work are adopted at all times
2. Safe and healthy working conditions are established and maintained
3. Employees and sub-contractors are made aware of potential hazards and precautions to be adopted
4. Employees and sub-contractors are trained in safe methods of work and the safe and efficient operation and maintenance of plant and equipment
5. Employees and sub-contractors receive adequate information, instruction and supervision to enable them to work in a safe and healthy manner
6. All accidents are investigated and reported as necessary and steps taken to prevent their reoccurrence.
7. Should there appear to be any conflict between health and safety at work and the demands of the work, the General Assembly's priority is to resolve the health and safety issue.
8. The overall responsibility for health and safety remains with the Chief Officer. The Health & Safety at Work Act requires the General Assembly to monitor the effectiveness of its policy and a review of the General Assembly's safety performance should be a regular part of normal business review.

14. Grievance Procedure

THIS PROCEDURE IS NOT CONTRACTUALLY BINDING

The object of the grievance procedure is to enable employees who consider they have a grievance or complaint arising from their employment with the General Assembly, or regarding behaviour by colleagues, to have it dealt with at the nearest appropriate level and within as short a time as possible. Anyone wishing to use this procedure can do so freely and without prejudice to his/her position in the organisation. It applies to all employees and workers, irrespective of job or grade.

Informal Procedure

We wish any employee or worker who feels dissatisfied with a matter relating to their work to be able to resolve the issue as soon as possible. It is necessary to make clear at the outset the difference between an informal approach and a formal one. The informal approach should usually be tried first, as it might be possible to resolve the issue speedily and there is nothing to prevent you making your complaint a formal grievance later. To use an informal approach we encourage you to speak to your manager to clarify what your concerns are and to discuss why you are dissatisfied.

Formal Procedure

If you do wish the grievance to be dealt with formally you should write to the Chief Officer setting out what your grievance is. (Email is regarded as a written medium.) If the grievance concerns the Chief Officer, then you may commence the formal process with a written note to the Convener of the Executive Committee. A meeting with you will be arranged. You are expected to continue to work normally during this period.

The meeting will normally take place without undue delay and will be arranged for a reasonable time and location taking into account the needs of those attending. Occasionally it may be necessary to delay the meeting in order for an investigation to be taken place. You may wish the grievance to be heard by a third party, and not your manager, and you should ask for this to occur. If the General Assembly believes that this is a reasonable request it will allow this change of manager or alternatively a suitable external third party appointed by the General Assembly to hear your grievance. If there is no suitable alternative manager. If so you will be notified of the reason why. You have a duty to attend the hearing.

It might be that the meeting is adjourned in order for more information to be gathered, or for either party to get more advice. You may be accompanied at this meeting by a colleague or a trade union official of your choice. If your choice of person is not free on the day the meeting is arranged for, the General Assembly may delay the meeting for up to five working days, in order for your choice of companion to attend.

You will be told of the decision of the person holding the meeting with you, either at the end of the meeting or at some time afterwards.

If you do not consider you have received a satisfactory answer, you may use the second step of the Procedure, by setting out in writing your concerns about the outcome of the first meeting and sending it to the Chief Officer. Another senior manager or member of the

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Executive Committee other than the one who held the first meeting with you, will arrange an appeal meeting with you and then make the final decision as to the way that this grievance will be decided. You have the right to be accompanied to this meeting by either a colleague or trade union official.

You will be told of the outcome of this meeting.

You are expected to continue to work normally during this entire procedure.

Vexatious Grievances

The General Assembly recognises the right of its employees to raise grievances relating to their employment. However, if an employee raises a grievance which appears to be vexatious or otherwise not made in good faith, this could lead to disciplinary action being taken against them. Any situation where an employee is thought to be deliberately wasting time and resources in this way will be referred to a senior manager who has not been involved in the process so far to consider whether it should be treated as vexatious or not raised in good faith.

Malicious Grievances

Where an investigation shows that a grievance is unfounded and has been raised maliciously, this may lead to disciplinary action.

15.Procedure For Raising Concerns At Work/ Public Interest Disclosure

THIS PROCEDURE IS NOT CONTRACTUALLY BINDING

Introduction

The General Assembly is committed to the highest standards of openness, integrity and accountability. It seeks to conduct its affairs in a responsible manner taking into account the requirements of members, our staff and the protection of society in general.

The provisions of the Public Interest Disclosure Act give legal protection to employees against being dismissed or penalised by their employers as a result of publicly disclosing certain serious concerns. The following procedure is the General Assembly's internal policy for handling any such disclosures. It is a fundamental term of every contract of employment that an employee will faithfully serve his or her employer and not disclose confidential information about the employer's affairs. However, where an individual discovers information which they believe shows malpractice or wrongdoing within the organisation, then this information should be disclosed without fear of reprisal, and may be made independently of line management.

It should be emphasised that this policy is intended to assist individuals who believe they have discovered malpractice or impropriety. It is not designed to question financial, doctrinal or other decisions taken by the General Assembly unless they involve malpractice or impropriety. Nor may it be used to reconsider any matters which have already been addressed under grievance or disciplinary procedures. This procedure provides a method of resolving issues and ensuring the highest standards of integrity by working within the General Assembly and avoiding the need to raise issues outside of the General Assembly, with members or in the media.

Scope of Policy

This policy is designed to allow employees to raise concerns and disclose information at a high level, which the individual believes shows malpractice of some kind on the part of the employer, or another employee, worker or adviser.

A number of policies and procedures are already in place including grievance, harassment, and discipline. This policy is not intended to replace these other procedures but, rather, is intended to cover concerns which are in the public interest and may (at least initially) be investigated separately but might then lead to the using of such procedures.

For the purposes of this policy a "disclosure" is any disclosure of information which, in the reasonable belief of the person making the disclosure, tends to show that:

- A criminal offence has been committed, is being committed or is likely to be committed,

- A person has failed, is failing or is likely to fail to comply with a legal obligation to which he or she is subject,
- A miscarriage of justice has occurred, is occurring or is likely to occur,
- That the health and safety of any individual has been, is being is likely to be endangered,
- That the environment has been, is being, or is likely to be damaged, or
- That information tending to show any matter falling within any one of the preceding paragraphs has been, is being or is likely to be deliberately concealed.

A disclosure will not however qualify for protection if the person making the disclosure commits an offence by making it, or if it is a disclosure in respect of which legal professional privilege would apply. Protection is not limited to issues that occur only in the UK.

Safeguards

Protection

This policy is designed to offer protection to those employees who disclose such concerns provided the disclosure is made:

- i) in the reasonable belief of the individual making the disclosure that it tends to show malpractice.
- iii) to an appropriate person/body (see section 4 below).

It is important to note that no protection from internal disciplinary procedures is offered to those who choose not to use this procedure, but who make a disclosure to some other person or body.

Confidentiality

The General Assembly will treat all such concerns in a confidential and sensitive manner. The identity of the individual making the allegation will be kept confidential so long as it does not hinder or frustrate any investigation. However, the investigation process may reveal the source of the information and the individual making the disclosure may need to provide a statement as part of the evidence required.

Anonymous Allegations

This policy encourages individuals to put their name to any disclosures they make. Concerns expressed anonymously are much less powerful, but they will be considered at the discretion of the General Assembly.

In exercising this discretion, the factors to be taken into account will include:

- the seriousness of the issues raised.
- the credibility of the concern; and
- the likelihood of confirming the allegation from attributable sources.

Untrue Allegations

If an individual makes an allegation which is not confirmed by subsequent investigation, no action will be taken against that individual. If however an individual makes malicious or vexatious allegations, and particularly if he or she persists with making them, disciplinary action may be taken against the individual concerned.

Procedures for Making a Disclosure

The legislation is intended to encourage disclosures of information through appropriate channels first, rather than going directly to an outside person and therefore protection rests on selecting the appropriate channel for disclosure. The channels are as follows:

1. **to the responsible person:** either to the employer (where the employer is, in law, responsible), or to another person who the employee/ worker reasonably believes to be legally responsible for the failure. (see section 5 below.)
2. **to a legal adviser:** where the disclosure is relatively straightforward and is made in the course of obtaining legal advice.
3. **to a Minister of the Crown:** where the worker's employer is an individual or body appointed by a Minister under a statute.
4. **to a prescribed person:** as defined by Order.

In other cases, protection will apply providing that the employee makes the disclosure in good faith, reasonably believes the allegation to be substantially true, does not disclose it for gain and:

- believes that the employer would subject him/her to detriment if s/he disclosed it to the employer (or a prescribed person), or

- believes that the evidence would be concealed or destroyed if disclosed to the employer, or
- has already made the disclosure to the employer or prescribed person, and
- in all the circumstances of the case, disclosure is reasonable.

Where the disclosure concerns exceptionally serious matters, the employee will not lose protection by bypassing one of the other channels.

Initial Step of Disclosure to the Employer

The individual should make the disclosure to their manager or the Chief Officer. If the allegations involve the Chief Officer, the disclosure should be made to a member of Council.

Process

On receipt of a disclosure, the manager, Chief Officer or member of the Council will consider the information made available to him/her and decide on the form of investigation to be undertaken. This may be

- to investigate the matter internally
- to refer the matter to the police
- to call for an independent inquiry

If the decision is that investigations should be conducted by more than one of these means, the manager, Chief Officer or member of the Council should satisfy himself/herself that such a course of action is warranted.

Where the matter is to be the subject of an internal inquiry, the manager, Chief Officer, Convenor, member of Council will then consider how to conclude whether there is a prima facie case to answer. This consideration will include determining:

- who should undertake the investigation
- the procedure to be followed
- the scope of the concluding report.

Internal Investigation

Investigations should not be carried out by the person who will have to reach a decision on the matter. Any investigation will be conducted as sensitively and speedily as possible and is to establish the facts of the matter only.

Where a disclosure is made the person or persons against whom the disclosure is made will be told of it, the evidence supporting it and will be allowed to comment before any investigation, or further action, is concluded.

Outcomes of Investigations

Once all the facts are established the manager, Chief Officer, Convenor or member of the Council will decide whether further action should be taken or not.

If further action is to be taken, then this will normally be through using existing General Assembly procedures, such as those relating to:

- Disciplinary and Capability Review
- Grievance
- or it might form the basis of a special investigation.

In some instances, it might be necessary to refer the matter to an external authority for further investigation.

Feedback

The manager, Chief Officer or member of the Council will inform the individual making the disclosure of what action, if any, is to be taken. If no action is to be taken, then the individual concerned should be informed of the reason for this and allowed the opportunity to remake the disclosure to another appropriate person. For example, if the initial disclosure was made to a manager or the Chief Officer then the subsequent disclosure might be made to the Convenor or other member of the Council. This other person will consider all the information presented, the procedures that were followed and the reasons for not taking any further action. The outcome of this will be either to confirm that no further action is required or that further investigation is required and will follow the procedures referred to above.

16. Disciplinary And Capability Review Procedure

THIS PROCEDURE IS NOT CONTRACTUALLY BINDING

Introduction

The following procedure that applies to all employees is set out in order to deal fairly with matters of possible misconduct or poor work performance. In this procedure we refer to your work performance as 'capability' and poor work performance may lead to a formal 'capability review'. If it is a matter of alleged misconduct, then it is a matter of "discipline".

This procedure shall be used in all cases where there are concerns about either of these two areas. However, this procedure is not contractually binding and the General Assembly reserves the right to enter this procedure at any stage, according to what is appropriate in the circumstances, and may not use it at all where the employee has been employed for less than two years with the General Assembly.

The General Assembly's policy is to investigate the situation and then, if formal action is taken, to give the employee the opportunity to state his or her case. It also gives the right to appeal against disciplinary or capability review action.

1. Purpose of the Disciplinary and Capability Review Procedure.

The aim of this procedure is to ensure that your behaviour or performance is of a standard that is entirely acceptable.

This procedure is designed to clarify the rights and responsibilities of the General Assembly and employees, where acceptable standards of performance or conduct have not been maintained. It ensures that any action taken by the General Assembly is consistent with what has gone before or sets precedents for the future in an appropriate way.

This procedure recognises that there is a distinction between relatively minor disciplinary offences and gross misconduct. It is designed to deal with both categories. However, nothing within this procedure takes away from managers the responsibility of informally bringing issues of capability or conduct to the attention of the employee. Such actions by managers are a normal part of their duties, and they will ensure that all employees are clear whether their actions are taken under the formal provisions of this procedure or not.

2. Principles

a) It is hoped that minor issues, such as small breaches of policy and practices can be dealt with informally, by means of normal staff / management relationships. Performance counselling may be used to help improve poor performance. However, if these less formal Staff Handbook of the General Assembly of Unitarian and Free Christian Churches

approaches do not lead to an improvement or where the matter is more serious the following disciplinary and capability review procedure is to be used.

b) The procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated.

c) At every stage you will have the opportunity to state your case and be accompanied, if desired, at the disciplinary or capability review hearing (not at an investigation meeting) by a fellow employee or a trade union officer, if either are willing to attend.

d) Prior to a disciplinary or capability review hearing (but not before an investigation meeting) you will be told the nature of the alleged offence or performance shortcomings, the nature of the evidence, the range of possible outcomes and reminded of your right to be accompanied.

e) You have the right to appeal against any disciplinary penalty or other decision and to be accompanied by a fellow employee or a trade union officer at any appeal hearing.

f) A warning will usually contain a date after which it will be disregarded in any further disciplinary hearing. This will generally be 12 months but in appropriate cases, the right is reserved to extend this period.

g) The procedure may be implemented at any stage where in the opinion of senior managers the circumstances justify such a course of action.

3. Performance Counselling

Performance counselling is an attempt to correct a situation and prevent it from getting worse without having to use the disciplinary and capability review procedure. Where improvement is required, you will be given clear guidelines as to:

- What is expected in terms of improving shortcomings in conduct or performance,
- The time scales for improvement,
- When this will be reviewed,
- You will also be told, where appropriate, that failure to improve may result in formal disciplinary action.

A record of the performance counselling will be given to you and a copy retained in your personnel file. Counselling will be followed up and improvements recognised and recorded.

Once the counselling objectives have been met, any record of the performance counselling will be removed from the employee's file after twelve months.

If during performance counselling it becomes clear that the matter is more serious, then the discussion should be adjourned, and the issue pursued under the formal disciplinary and capability review procedure.

4. The Categories and Examples of Misconduct or Unsatisfactory Performance

You are expected to observe all the General Assembly rules and to behave in a reasonable way towards the General Assembly, other employees and members of the general public. You should note that the following lists are not exhaustive but are examples of misconduct or unsatisfactory performance which are likely to lead to allegations that will be dealt with under the guidelines of this procedure.

4.1 Misconduct other than Gross Misconduct or Unsatisfactory Performance

Unsatisfactory performance and misconduct amounting to less than gross misconduct do not normally constitute grounds for dismissal on the first occasion. However, if they occur more than once this may result in further disciplinary action which may result in dismissal after a final formal warning has been given. The following list, which is not exhaustive or exclusive, gives examples of such offences:

- Poor standard of job performance, in terms of either quantity or quality
- Poor timekeeping. Persistent lateness will be considered as serious misconduct
- Breach of General Assembly rules, provided no danger to health and safety was involved
- Petty insubordination or behaving in a mildly disorderly manner
- Failure to report an accident or incident that has a potential impact on safety
- Smoking in an area where it is not permitted, but not hazardous to do so
- Persistent absenteeism, which appears to be unreasonable
- Failing to maintain reasonable standards of presentation or appearance

4.2 Gross Misconduct

The following list, which is not exhaustive or exclusive, sets out examples of misconduct, which if committed **may lead to summary dismissal on the first occasion for gross misconduct:**

- Dishonest conduct of any kind, including but not limited to theft or pilferage of General Assembly property, the property of other employees or the property of others.
- Being absent from work for no good reason or giving a false reason for being absent from work.
- Failure to comply with the relevant statutory or regulatory requirements.
- Conduct on or off duty that brings the General Assembly into disrepute.
- Serious negligence which causes or might cause unacceptable loss, damage or injury.
- Disclosure of confidential information.
- Posting any material online that brings the General Assembly into disrepute. Such material includes but is not limited to: offensive statements or content sharing workplace frustration, threatening statements, material that demonstrates inappropriate behaviour in the work place or using social media to bully or intimidate colleagues or customers.
- Knowingly or recklessly installing, creating, introducing or proliferating within the systems of the General Assembly or elsewhere, any disruptive virus or code, or other disruptive element.
- Serious or wilful damage to the General Assembly's, or a fellow employee's property.
- Falsification or misrepresentation of expense claims or other paperwork for yourself or others.
- Conducting a business, or business activities, whether or not they are for profit, during working hours.
- Conducting business outside work that interferes with your work for the General Assembly. (We suggest that you ask your manager for clarification of this rule before taking up secondary employment.)
- Inappropriate use of the internet or computer misuse.
- Making malicious claims of harassment or bullying against colleagues or members.
- Failure to carry out a direct instruction from a manager.
- The use of bad language or aggressive behaviour on General Assembly premises, in front of the public or towards other employees.
- Serious breach of General Assembly rules, policies and procedures, especially where it concerns health and safety
- Fighting, harassing, threatening or otherwise intimidating other employees on or off duty, or making racial, religious, ageist, sexual or ethnic remarks, or comments implying discrimination on the grounds of disability, orientation or transgender status.
- Reporting for work whilst showing signs of the use of intoxicants, possessing or taking of any intoxicants on General Assembly premises, other than a moderate drinking of alcohol at General Assembly sponsored events.
- Indecent or immoral acts while at work
- Allowing or condoning a breach of the law

- Removing any material or equipment from your place of work without prior permission.
- Receiving bribes to effect the placing of business with a supplier of goods or services.
- Unauthorised access or attempted access into General Assembly computer systems and records or assisting others to do so.
- Receiving gifts or services (worth more than around £20) from clients or suppliers without declaring them to the General Assembly.

Any act of misconduct, gross or otherwise that is not specifically referred to above may nonetheless result in disciplinary action being taken, up to and including dismissal.

5. Alcohol and Drugs

Under no circumstances are employees permitted to bring alcohol onto General Assembly premises, or premises belonging to churches, and consume it without specific permission for a particular event. Under no circumstances are employees permitted to bring illegal drugs onto General Assembly premises, or premises belonging to churches.

If you are taking any drugs for medical reasons that might affect your alertness in any way you must inform your manager as soon as reasonably possible.

6. Legal Proceedings

If criminal proceedings are instituted against any employees during the course of their employment with the General Assembly, the General Assembly may have to investigate if this affects their ability to continue their normal duties. If they are found guilty in a court of law, or the General Assembly regard the matter to be serious enough, the General Assembly will give serious consideration to the affect this has on the employment and in certain cases this may result in their employment being terminated.

7. Sanctions

Disciplinary action will vary according to each individual case. Before any decision is made to impose a sanction on the employee there will be a thorough investigation of the circumstances and events involved. The categories of sanctions are as follows:

- Initial written warning
- Final written warning
- Dismissal (As an alternative in cases of poor performance an offer of a demotion might be made, if a suitable position is available.)

Written warnings remain in force for twelve months. However, where appropriate and reasonable, a longer period may be used and you will be notified of that period.

8. Being Accompanied

You have the right to be accompanied to all disciplinary or capability review hearings and their appeal hearings by a colleague employed by the General Assembly or a trade union official trained and accredited by their union for the role. (You do not have the right to be accompanied to an investigation meeting.) The General Assembly will postpone a hearing for up to 5 working days to allow your choice of person to be present. A hearing will only be postponed once for such reason.

9. Investigations

In cases of possible misconduct, investigation of the evidence and background to the case will be undertaken by a manager, who will not be the person who conducts the hearing. The output of the investigation may be a collection of statements and/or a report that will enable a manager to decide whether a formal disciplinary hearing is justified. After receiving this report, the hearing manager will decide whether or not a hearing should be convened.

The usual practice is for the investigator to interview any witnesses and write down their statement of events. If this is not convenient, the witnesses will be asked to write their own version of what happened. If an investigation meeting is held prior to a disciplinary or capability review hearing, you are not entitled to be accompanied to that meeting.

In cases of alleged poor performance your manager will set out what the concerns are about your performance before any hearing.

10. Statement of the Grounds for Action Being Taken

If you are invited to a disciplinary or capability review hearing, you will receive a written statement of the alleged conduct or characteristics or other circumstances that have led to the hearing being convened, and will be provided with a written account of evidence where that is relevant. This may be on paper or via email.

You will have a reasonable period of time, usually at least 48 hours after receiving the statement and evidence to consider your response before the hearing is held.

11. Suspension with Pay Whilst Investigation Takes Place

You may be suspended on non-disciplinary grounds with pay while an allegation is being investigated. Whilst you are on suspension you are not to come onto General Assembly premises without your manager's permission or contact any employee, except for the limited reason of arranging to be accompanied by a colleague.

12. Resignation During Disciplinary Proceedings

Should you resign during the course of disciplinary and capability review proceedings, the proceedings will cease unless there are extenuating circumstances which require its continuance. You may also request that the disciplinary action continue.

13. Hearings

The purpose of a hearing is to investigate the facts to do with your apparent unsatisfactory performance or misconduct. You will have the right to be accompanied by a colleague or trade union official to the hearing. This person is allowed to speak on your behalf if you wish them to but cannot answer questions put to you directly. You do not have to be accompanied and will not be disadvantaged if you are not. Generally, the General Assembly will try to give you at least 48 hours' notice of the hearing.

If you think that the hearing is not being conducted in a proper way, or the reason for taking the action is unfairly discriminatory, you can ask for a grievance about the disciplinary process to be heard at any time. If this does occur the disciplinary and capability review process will be adjourned, so that your grievance about the procedure can be addressed. If the issues you raise are not connected with the possible misconduct or lack of capability, then the process will not be adjourned, and a separate grievance process will take place. Grievances about other matters will not cause the hearing to be adjourned.

If you do not attend a hearing for a good reason, it may be postponed once. If you fail to attend for the re-convened hearing, it may be held in your absence and this will not count as a failure to follow this procedure.

The hearing will proceed in the following manner:

1. You will be told the specific allegations against you, including a review of the evidence that you already have.
2. You will be given the opportunity to state your case and produce any evidence that you wish to.
3. If you wish to suggest any further lines of enquiry, and if they are reasonable and relevant, the hearing will be adjourned until these further enquiries can be made.
4. If the case against you has been established, you may give examples of any mitigating circumstances.
5. After you have had the chance to state your case an adjournment will take place before the manager makes a decision. The adjournment may be for a few minutes, or it may be for a number of days.

After an adjournment you will be informed of the outcome of the hearing and what level of warning is being given, if any; or that you will undergo a period of unpaid suspension or be dismissed. You will also be told that you can appeal against any disciplinary decision. If the warning is for poor performance, the manager will agree the performance standards expected of you during a review period, and offer whatever help you reasonably need, in order to meet these standards during the review period.

14. Letters of Warning and Dismissal

All letters of warning will contain the following information:

- The nature of the offence and where appropriate, that if further misconduct occurs or if performance improvement does not occur, that more severe disciplinary action will be taken. In the case of a final written warning, reference should be made to the fact that any further misconduct will lead to dismissal.
- In cases of poor performance, the period of time given to you for improvement.
- Your right to appeal and to which manager to direct that appeal.
- That all warnings have a life of at least 12 months from the date given, after which time they will be disregarded for disciplinary purposes. (In certain situations, such as where there has been a repeat of previously unacceptable behaviour, the warning might last more than 12 months.)

The letter confirming dismissal will contain the following information:

- The reason for dismissal and any administrative matter arising from the termination of your employment.
- Your right of appeal and to whom you should make that appeal.

15. First Warning

Where it is not a case of gross misconduct, after a properly convened and run disciplinary or capability review hearing, on the first occasion that a sanction is imposed, the General Assembly will usually give a written warning to you. If any warning concerns inadequate performance, a set period of time will be indicated for review of your performance, and the standards that you are meant to attain will be made clear. Details of the warning will be recorded on your personal file.

If any warning concerns inadequate performance, a set period of time will be indicated for review of your performance, and the standards that you are meant to attain will be made clear and you will be given all reasonable assistance to reach the required standard. The review of your performance will be conducted at the specified time interval and this will constitute a formal disciplinary hearing. After the hearing you will either be told that you have

reached the standard so no further warning will be given, or that you have not reached the standard required and so will receive a final written warning (see below). If your performance has improved so that no further warning is given, the first written warning is still in force for 12 months and regular reviews will be carried out with you during that time to ensure that you maintain the standard required.

All warnings have a life of at least 12 months from the date given, after which time they will be disregarded for disciplinary purposes. (In certain situations, such as where there has been a repeat of previously unacceptable behaviour, the warning might last more than 12 months.) Details of the warning will be recorded on your personal file.

A written warning will be given to you and you will be asked to sign a copy as proof of receipt. If you refuse to sign it, this will be recorded on the warning.

16. Final Written Warning

If there is no improvement since the issue of a first written warning or another offence has been committed, or an extremely serious offence has occurred for the first time, a final written warning will be given to you by the General Assembly after a properly convened and run disciplinary or capability review hearing.

17. Dismissal

Where you have still failed to meet the required standards or have committed further misconduct or in any case of gross misconduct, dismissal may be considered appropriate. In cases of gross misconduct, the General Assembly will generally terminate employment without notice being given or pay in lieu of notice being paid.

18. Appeals

You have the right to lodge an appeal against a disciplinary or capability review action within five working days of being informed of the outcome of the hearing. You may appeal on the grounds that you did not commit the alleged offence, or that the penalty imposed was too severe. Your appeal should be sent to your manager, who will arrange for an appeal hearing. The appeal hearing will generally be a review of the case, or you may ask for a complete re-hearing of the case, if you believe that facts were not properly taken into account. The appeal will be heard by a person who has not been involved in the initial proceedings or investigation. The appeal will review but cannot increase a disciplinary penalty. An answer should normally be given to you within five working days of the end of any such appeal.

19. Notes to the Procedure

19.1 Unless you appeal against a disciplinary decision within five working days of the action being taken, the General Assembly will assume that you have accepted the decision. This period may be extended by a reasonable amount of time if there is a good reason to do so, such as sickness or holiday absence. Although an answer to your appeal should be given

to you within five working days, there may be circumstances where it is not possible to do so.

19.2 It is the responsibility of the General Assembly to fully investigate all the facts before disciplining you. These investigations will allow you to hear the evidence against you and will include giving you the opportunity to state your side of the case and to explain your point of view.

19.3 As appropriate disciplinary action will always depend upon the circumstances of the individual case. It may not always be appropriate for this procedure to be followed in the order explained above. In circumstances where it is reasonable to do so, disciplinary action may be commenced at any stage of the above procedure.

19.4 Nothing in this procedure is intended to remove the right of the General Assembly to give an informal reprimand or warning when you are believed to have committed a minor infringement of the established standards of conduct.