



Department
for Education

Exploring flexible working practice in schools: research appendix

Example resources provided to
research pilot schools

November 2020

CooperGibson Research



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About the research

The Department of Education (DfE) has committed to promoting flexible working with schools. Following the DfE flexible working summit in October 2017, the DfE made a public commitment to ‘carry out research looking at changing recruitment practices in schools, to inform our guidance about how schools can introduce flexible working’. The [Teacher Recruitment and Retention Strategy](#) (January, 2019) reinforced the DfE’s commitment to support schools to implement flexible working. Amongst other initiatives, the strategy stated a commitment to further research to support schools to implement flexible working.

Taking forward their commitment, the DfE commissioned CooperGibson Research (CGR) to gather evidence on the experiences of flexible working in schools and ways in which these practices may be supported.

It encompassed several stages of quantitative and qualitative data collection:

- A review of literature to identify existing evidence on flexible working practice in schools and from comparable sectors, in England and internationally. For the published literature review, see: CGR (2018), [Flexible working practice in schools: literature review](#), DfE.
- An online survey of 2,896 senior leaders and teachers, to understand existing approaches to flexible working practice in schools, perceptions and experiences of flexible working. For the survey findings report, see: CGR (2019), [Exploring flexible working practice in schools: Interim report](#), DfE.
- In-depth interviews with 50 schools to explore current flexible working practices in relation to school context. For the published report, see CGR (2020) [Exploring flexible working practice in schools: final report](#), DfE.
- A pilot of flexible working practices with six schools to explore how flexible roles can be effectively designed and implemented within schools. The pilot ran from March to October 2019, and culminated in six summary reports outlining school contexts; the work they undertook during the pilot; and the challenges and solutions to enabling flexible working in each school.¹

The purpose of this document

This research appendix includes three research materials used as a part of the flexible working research pilot. These materials were developed specifically for the six participating schools to use within the pilot. The participating schools represented

¹ To view the pilot school summaries, see CGR (2020), [Exploring flexible working practice in schools: pilot school summaries](#). DfE.

different school phases and types, including primary, secondary and special, and local authority maintained, single academy, and multi-academy trusts. As such, the resources were designed to be generic and adaptable to suit their different contexts.

The resources are being published here, as an annex to the final research report, to provide evidence of some of the types of support provided to the schools participating in the pilot. They may also serve as examples that other schools may wish to draw from for their own purposes.

Please note that these are pilot resources provided to schools as part of this research project, and not official DfE resources. The DfE's official guidance and resources on flexible working can be found [here](#).

What is included in this document?

During the pilot, schools expressed a need for additional materials to inform their understanding of how to introduce flexible working, formalise procedures, communicate their approach to flexible working to their workforce, and key considerations for certain types of flexible working. As a result, a set of materials were produced by CooperGibson Research with help from HC Associates (human resources (HR) specialists) and Waterman Learning (education consultants), in liaison with the DfE.²

The resources were developed between April and September 2019 during the pilot, and revised slightly in early 2020. They likely to be subject to any policy or legislation changes after the time of publication.

Each chapter presents one of the documents listed below:

[Resource 1: Policy and procedure for dealing with flexible working requests](#) - an example flexible working policy for schools. This emphasises the right to request and duty to consider flexible working. It includes an outline of what flexible working constitutes, statutory rights and responsibilities and the processes involved in making an application and dealing with a request.

[Resource 2: Job share toolkit for schools](#) – a practical guide to enabling successful job share arrangements. It includes the benefits of job shares, challenges, practical steps and key questions to consider.

² Additional resources were provided to schools during the pilot. However, as these were designed specifically for individual school needs and contexts, they have not been included within this appendix.

Resource 3: A guide to home and remote working for schools – a practical guide to enabling successful home/remote working. It includes the benefits of home/remote working, challenges, example of how schools have implemented home/remote working and practical steps to take before implementing home/remote working and while it is in place.

Pilot Resource 1: Policy and procedure for dealing with flexible working requests

Policy and procedure for dealing with flexible working requests: introduction and purpose

About this document

This document is an example of a policy for dealing with requests for flexible working arrangements. It has been developed as part of the flexible working pilot, which forms the last phase of the research project exploring flexible working practice in schools, commissioned to Cooper Gibson Research (CGR) by the Department for Education (DfE).

The policy and procedure document can be used by schools during the pilot and beyond if they wish to. It is a policy and procedure document that could be adopted by schools to explain the right of staff to ask for, and the duty of school managers to seriously consider, flexible working requests. This document is written for schools to use, it can be adapted to suit their context and requirements. **Where the document states 'we' this means the school, its Governing Body and/or Trust.**

The term 'allocated manager' is used throughout, which should be amended to suit the school. It is suggested that a manager has allocated responsibility to deal with flexible working requests. Schools should also delegate responsibility for approving or rejecting applications and considering appeals; the document refers to the Head Teacher and the Governors in these roles but this may also need amendment.

This policy and procedure document has been drafted in line with the ACAS guide to the right to request flexible working³. It states the minimum timescales and requirements for dealing with each stage of a request. Schools could choose to extend these stages if they wish but should take human resources (HR) or legal advice if they consider shortening them.

³ ACAS (2014), *The right to request flexible working: an Acas guide (including guidance on handling requests in a reasonable manner to work flexibly)*. Access the guide at: <http://www.acas.org.uk/media/pdf/1/7/The-right-to-request-flexible-working-the-Acas-guide.pdf>

Policy and procedure for dealing with flexible working requests

Introduction

1. We are committed to equality of opportunity and to that end, raising staff awareness about the entitlement to ask for flexible working. We believe it will enhance the work-life balance of our staff, and support effective recruitment and retention to our school. No employee who makes a request for flexible working will be subject to any detriment or lose any career development opportunities as a result.
2. All staff with 26 weeks service are entitled by law to ask to work flexibly. We hope the policy will encourage those contemplating retirement to consider phased retirement and remain in teaching longer. We will publicise the options for flexible working to staff, including those due to take family-related leave, such as maternity, adoption, shared parental leave, and to staff who are carers.
3. The Children and Families Act 2014 introduces a right for anyone to request to work flexibly following 26 weeks of continuous employment. It does not provide an automatic right to work flexibly but aims to encourage both the employee and the employer to consider a flexible working pattern and to find a solution that suits them both. The right was extended from the previous right which allowed only parents and carers this opportunity.
4. This policy works alongside our [absence policy/policy on other leave – *delete as appropriate*] to provide time off for various reasons for carers of dependents and for other family related reasons. Statutory leave for other reasons must be requested in advance in line with our policy and is not generally paid.
5. We have a duty to ensure that requests are dealt with reasonably and in a timely manner. The school will delegate responsibility for dealing with requests to the [allocated manager].

Eligibility

6. An employee is entitled to make a request if they:
 - Are an employee and not an agency worker.
 - Have worked for their employer continuously for 26 weeks at the date the application is made.
 - Have not made another application to work flexibly under the right during the past 12 months.

Entitlement

7. Eligible employees can request any change to the hours or weeks or place/location in which they work. They have a responsibility to think carefully about their desired working pattern when making an application. The employee must consider the impact of the request on the school and their colleagues and suggest solutions to these issues.
8. A request may be for any reason; it could vary from asking to start half an hour later than usual to allow the employee to drop their child off at school on one or more days, to a more significant change to their work hours in order to fit better with their lifestyle.
9. Examples of requests may be to work on a job share basis, part-time, personal/family days, staggered hours, staggered weeks, compressed hours or to work for some of the management time (non-teaching time for teachers with management responsibilities), Planning, Preparation and Assessment (PPA) from home or phased retirement. See appendix 1 for more guidance on different types of flexible working.

Making an application

10. The employee must put in a written application to the [allocated manager] stating what the change is they are proposing and when they want the change to start; the request should be made at least three months in advance of the proposed date of change. Any request that is made and accepted under the statutory right will normally be a permanent change to the employee's contractual terms and conditions, unless otherwise agreed. The employee has no legal right to revert back to the previous working pattern and would need to submit another flexible working request if they wish to return to the previous working arrangements. This means that it is important to think about the longer term and financial implications of the request.

11. Leadership staff, in particular, should consider the impact of their request on the remaining staff group, plan how their staff will receive direction and guidance on days when they will absent. They should also think about the impact on senior colleagues and themselves – particularly how any negative impact can be managed.
12. In order for a smooth return to work, with appropriate arrangements in place for any changes to working hours, employees due to go on maternity leave are encouraged to speak to the [allocated manager] before starting maternity leave if they wish to apply to work flexibly on their return. The arrangements can also be discussed during Keeping in Touch days in advance of a return to work. This means that their request can be properly considered, and arrangements made to explore options for a change in the working time/hours well before they return to work.
13. One application a year can be made under the right. Each year runs from the date the application was made.
14. If an employee wishes to vary their contract on a temporary basis to cope with a short term need then the school may be able to consider this as an informal request but these requests are not covered by the legal right to request flexible working (see also paragraph 20).

Responsibility for considering applications

15. A response to the request must be given within three months, including the conclusion of any appeal; this could be extended by mutual consent. The Head Teacher will usually consider the initial application, and any appeal will then be considered by the Governors/Trust board.
16. A flow chart with timescales is attached at Appendix 2 which will ensure the three-month deadline is met.
17. The [allocated person] will check that all information required is complete and then acknowledge receipt of the request by signing and dating the request and sending a copy to the employee.

Meeting to discuss the request for flexible working

18. The [allocated manager] will arrange a face-to-face meeting with the employee to discuss the request within 28 days of the application being made.
19. At the meeting both parties should discuss the desired work pattern in depth and consider how it might be accommodated; being as flexible as possible on both

sides. If the requested working pattern cannot be accommodated, they should discuss possible alternatives, with both parties bringing suggestions for amendment that they believe might be more easily accommodated.

20. At the meeting the [allocated manager] should ensure that the employee understands that the change to their contract will be a permanent one and explore the reasons for the change request. If the employee is looking for a temporary informal change (such as to look after a relative convalescing), then this could be dealt with by an informal agreement for an agreed period, and put in writing, but without a formal change of contract. Both parties must be in agreement with this approach.
21. If an employee fails to attend the meeting more than once, and does not provide a reasonable explanation, the school may treat the application as having been withdrawn.
22. It may be agreed that a new working pattern will take place for a trial period in order to see how it would suit both the individual and the school.

Considering a request – reaching a decision

23. In considering a request, the Head Teacher should make sure their decision is not discriminatory in any way.
24. If the decision is accepted, the Head Teacher must inform the employee of their decision in writing. Details of the new working pattern must be confirmed in writing to the employee as an addendum to their contract of employment. Where a trial period has been agreed this should be stated as such.
25. Following the meeting, if the Head Teacher is willing to agree to the request in principle, but needs more time to look into certain aspects of the request, they should suggest an extension of the time limit to deal with the request.

Refusing a request

26. There may be circumstances where, due to the needs of the school, it is difficult to agree to a request. A request can be refused for a clear business reason from one of those listed below:
 - Burden of additional costs.
 - Detrimental effect on ability to meet pupil needs.
 - Inability to reorganise work among existing staff.
 - Inability to recruit additional staff.

- Detrimental impact on quality of education or service.
- Detrimental impact on performance.
- Insufficiency of work during the periods the employee proposes to work.
- Planned structural changes.

27. In refusing a request, the Head Teacher must write to the employee explaining the business grounds for refusal and their right to appeal the decision.

Appeal

28. An employee must appeal in writing within 14 days of receipt of written notice that their request has been rejected detailing the reasons for the appeal. The appeal meeting must take place within 14 days of written notification of the appeal and the school should inform the employee of the outcome in writing within 14 days of the meeting. This is the final decision and is the end of the formal procedure within the school.

29. If the appeal is successful then further discussions may be needed to clarify how the new working arrangements can be accommodated, with particular emphasis on the reasons why it was initially refused. This will ensure that both parties are pleased with the eventual agreement.

Extension of time limits

30. There are two circumstances where the time limits may be extended; by agreement if the Head Teacher requires extra time to speak to another employee, who is away, or needs to advertise the remaining hours; or due to the absence of the person delegated to consider the application – the Head Teacher or their designated deputy.

When can an application be treated as withdrawn?

31. There are three reasons why an application may be treated as withdrawn:

- The employee decides to withdraw the application.
- The employee fails to attend two meetings arranged to discuss the flexible working request.
- The employee unreasonably refuses to provide the [allocated manager] with the required information.

Further actions

32. An employee can make an application to tribunal if they feel that their request has not been fairly considered and the business reasons are not justified. They are also protected from discrimination on grounds related to their application for flexible working - whether or not it was granted.

Appendix 1: A brief guide to types of flexible working

33. A range of flexible working options are presented below. Those which are more popular and more applicable to the school environment are described below. This guide also aligns with the forms of flexible working described by the Department for Education (DfE) in their guide to flexible working in schools.⁴ Key challenges and potential solutions are also included. These are not exhaustive but will give an indication of some key considerations to be discussed.
34. These can be discussed on the understanding that the needs of the school are prioritised and balanced with the needs of the member of staff making the request.

Part-time working

35. Part-time arrangements are when staff work for a percentage of the hours of a full-time teacher, this being a portion of the 1,265 hours per year directed time, in line with the *Conditions of Service for School Teachers in England and Wales* (“the Burgundy Book”)⁵. Ten per cent of their working time should be for Planning, Preparation and Assessment (PPA).
36. Part of the full-time equivalent 1,265 annual directed time is usually used for attending various briefings and meetings before or after the pupil school day; as well as attending parent/carer consultation days with parents/carers of assigned pupils, open days and training (on the five days outside the 190 days that school is open).
37. The school should be clear with part-time staff about the proportion of directed time outside the timetabled teaching time that they are expected to attend. They should attend a proportion of meetings consistent with their contract – for example, 50% of meetings for a half-time teacher.
38. Part-time teachers should not be expected to attend meetings on days when they are not timetabled to teach, and although some staff are able to and do attend on these days, it cannot be a requirement if the teacher is employed on the national terms and conditions as described in the *School Teachers Pay and Conditions*

⁴ DfE (2017) *Flexible working in schools: Guidance for local authorities, maintained schools, academies and free schools*. Access the guide at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/593990/DFE_Flex_Working_Guidance_2017_FINAL.pdf (see p. 6 for key types of flexible working).

⁵ *Conditions of Service for School Teachers in England and Wales* (“the Burgundy Book” (revised edition August 2000). Access at: <https://www.teachers.org.uk/sites/default/files2014/burgundy-book.pdf>

Document⁶.

Job share

39. Job share is when two or more people do one job and the hours are split between them. For example, two people share a full-time job between them, and their hours can be varied according to the job share partners' preferences and needs. Job share partners should be responsible for handing over key messages to the partner to ensure consistency in the completion of tasks.
40. Communication is key to making a job share arrangement work. Planning shared handover time can be useful to making the arrangement run smoothly.
41. Reviewing job share arrangements during annual appraisal discussions can be useful to ensure all parties are clear and happy with their respective responsibilities, level of ownership and accountability.

Flexitime / lieu time

42. Flexitime or lieu time is the paid time off work that an employee gets for having worked additional hours. Flexitime usually entails working hours that are based on 'core hours' within the day when staff must be on site. There are typically around four core hours per day and staff are able to come in earlier or work later as long as they work the core hours. Staff work their core hours and are able to accrue credit hours or take flexitime off over a certain agreed period. Some employers have a freer policy on flexitime working when staff can come and go as they like; others have 'agreed normal working hours' for each employee which may be varied with advance permission.
43. In many schools it can be difficult to agree flexitime/lieu time for teachers due to the fact that for most teachers, their working hours are linked to the timetable and the pupil day; for many their working time also includes tutor time first thing in the morning. However, where the core hours are the official start and end times of the pupil day, there may be flexibility to accrue or take hours that are part of directed time outside the school day. This may include the 1,265 working hours per year when staff are directed to attend whole school briefings, staff meetings, faculty or key stage meetings.

⁶ DfE (2018) *School teachers' pay and conditions document 2018 and guidance on school teachers' pay and conditions*. This document has been updated since this resource was produced: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/832634/School_teachers_pay_and_conditions_2019.pdf

Staggered hours

44. Staggered hours is when the employee can have different start, finish and break times from other staff. Hours are spread across the week. Typically in schools, this would mean teachers cover their timetabled hours but stagger their hours by starting their working day later (for example, if PPA time or a non-contact period is the first period in the morning). They will then stay later to attend staff meetings or perform other duties such as pupil after school sessions, as agreed and directed by the Head Teacher.
45. Any such arrangements need to be confirmed in writing and agreed with other staff who may be impacted by the changed arrangement.
46. Where specialist staff teach sessions such as physical education (PE) or music, this is often to enable the class teacher to work on PPA elsewhere alone or with colleagues. If the specialist teachers deliver more than 10% of the teacher's class time, this would enable the teacher to work staggered hours and to perform other duties outside the traditional teaching day. In primary schools, after school hours could include assisting with booster sessions, enrichment activities, music or sports events.
47. In secondary schools it may be easier to agree this arrangement; especially for teachers who are not a form tutor, if they do not have duties at the beginning of the day, or are not timetabled to teach the morning period.

Staggered weeks

48. Staggered weeks is a formal agreement to work outside term time to, for example, deliver booster classes, sports programmes and enrichment activities.
49. This may be easier to agree than staggered hours, and may be easier in secondary schools where teachers are able to deliver the curriculum in a project-based approach. In this example, certain teachers work for a term to deliver a specialist subject then have a term off and work some weeks in the school closure periods to deliver enrichment or an extended curriculum offer.
50. The option could be considered for odd weeks/days rather than whole terms, which may be easier for schools to plan and use effectively.
51. Consideration would need to be given to communicate arrangements during time out of school, impact on colleagues, teacher-pupil ratios, pupil experiences, progress and outcomes.

Compressed working

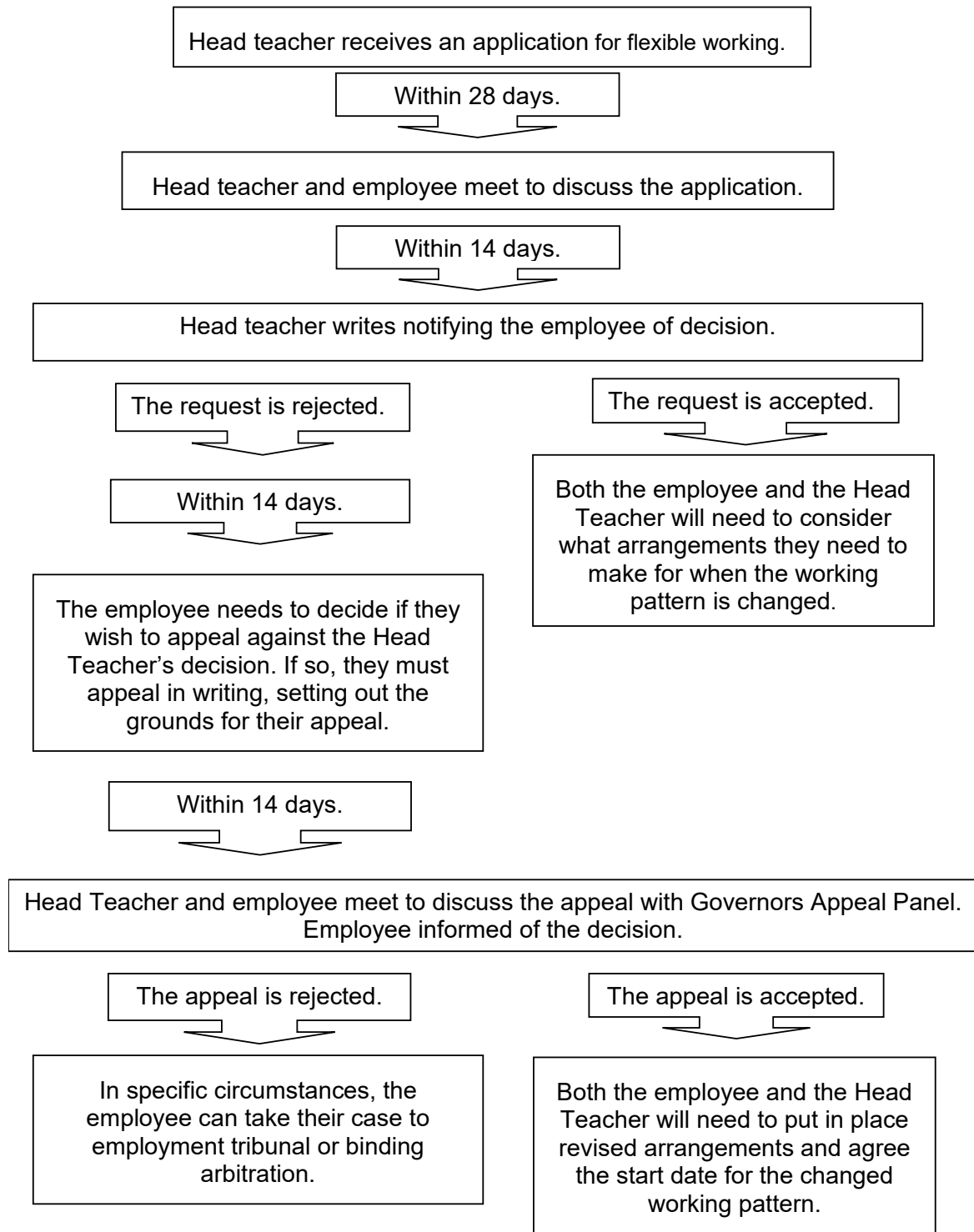
52. Compressed hours involves staff working full-time hours over fewer days, such as working five days in four or ten days in nine. There is no reduction in hours and, consequently, no change in pay.
53. Consideration would need to be given to the amount of cover needed and whether this would increase costs, or have an impact on colleagues and pupils.
54. The teacher still has a full responsibility for their contracted role but as their teaching is delivered over fewer days of the week, the timetable needs to be flexible enough to enable this to happen.

Other flexible working arrangements

55. There are other flexible working arrangements that could be considered, depending on their suitability to the school and individual. These are presented below.

Split role	Tasks are divided between two part-time job holders with no responsibility to handover or cover each other's classes. The two contracts have no link.
Split shifts	A working shift comprising two or more separate periods of duty in a day.
Homeworking or remote working	Regularly / formally agreed working from home of directed time / timetabled hours.
Phased retirement	Gradually reduced working hours and/or responsibilities to transition from full-time work to full-time retirement.
Annualised hours worked flexibly	Working hours spread across the year, which may include some school closure days, or where hours vary across the year to suit the school and employee.
Personal / family days	Days of authorised leave during term time.

Appendix 2: Flow Chart of the Process



Pilot Resource 2: Job share toolkit

A job share toolkit for pilot schools: introduction and purpose

Job share is when two or more people do one job and the hours are split between them. For example, two people share a full-time job between them, and their hours can be varied according to each person's preferences and needs.

This resource has been developed as part of the flexible working pilot, which forms the last phase of the research project exploring flexible working practice in schools, commissioned to CooperGibson Research (CGR) by the Department for Education (DfE). It has been developed to support teachers and leaders when requesting, considering or managing job share arrangements. It is designed as a tool to help guide discussions about job sharing and to help both teachers and school leaders consider how to ensure a job share arrangement is successful.

A job share toolkit for pilot schools

What are the benefits of a job share?

DfE and NUT guidance has highlighted that schools are anecdotally reporting the following benefits of job sharing:⁷

- The ability to employ teachers with a diverse set of skills and experience whilst offering equality of opportunity.
- Classes benefiting from the input and motivation of two teachers.
- A larger teaching staff, particularly in smaller schools, can be helpful for covering various aspects of the curriculum and provide flexibility in timetabling.
- Phased retirement through job sharing can retain skilled and experienced teachers for longer.
- Succession planning can be supported through job share arrangements, with the opportunity to shadow roles and create a smooth transition process.

As part of a job share arrangement, part-time working can have benefits more broadly:

- Teachers can find part-time working helpful for their work-life balance.⁸
- Part-time working can help to retain teachers in the profession.⁹

DfE guidance on flexible working also reported the potential to reduce ill-health absence and a quicker return to work after maternity leave.¹⁰

⁷ DfE (2017), *Flexible working in schools: Guidance for local authorities, maintained schools, academies and free schools*, p.7.; NUT (2016), *Flexible working: Guidance for members in England and Wales*, p.3; NUT (2012), *Job sharing – guidance for members*. Cited in CGR (2019) *Exploring flexible working practice in schools: Literature review*. DfE, p18. Note that the National Union of Teachers (NUT) has been subsumed into a new organisation, the National Education Union (NEU).

⁸ A sample of twelve part-time teachers interviewed as part of a sample of 75 teachers who had participated in DfE's Teacher Workload Survey 2016 and agreed to take part in follow-up interviews. CGR (2018), *Exploring teacher workload: qualitative research*. DfE, p.5. Also CGR (2018), *Factors affecting teacher retention: qualitative investigation*. DfE, p.36.

⁹ CGR (2019) *Exploring flexible working practice in schools: Literature review*. DfE, pp. 16-17.

¹⁰ DfE (2017), *Flexible working in schools: Guidance for local authorities, maintained schools, academies and free schools*, p.7.

What are key challenges associated with job share arrangements?

Job sharing can have many benefits but, like many examples of flexible working, it may also bring challenges, including:

- Maintaining strong communication between job share partners and building in time for hand-over.
- Building strong trust between job share partners starting from a position of a shared vision and similar approach.
- Ensuring consistent quality of provision.
- Ensuring clear accountability for pupil progress.
- Organising a timetable to suit school and individual needs.
- Difficulties in recruiting a job share partner.
- Additional costs to the school (for example, for cover, hand-over time).¹¹

What makes a job share work?

Research suggests that the success of flexible working practices is dependent on having a workplace culture that embraces and accepts flexibility and an understanding of how it can work. It is also important that schools and job share partners understand the expectations of the shared role and that policies and practices reflect this.¹²

The following are points to consider when requesting, considering or planning a job share arrangement.

- Shared values and consistency in approach are important. Each teacher or leader involved in a job share may have a different teaching or leadership style, but standards, expectations, routines and work-ethic should be the same, similar or complementary.
- Arrangements for communication and hand-over should be clarified from the very beginning.
- Potential risks and problems should be pre-empted and plans put in place to mitigate for them.
- The teacher or leader's performance management and accountability arrangements should be agreed in advance.
- Regular feedback from students, parents/carers, teachers and leaders should inform continual improvement and allow for adjustments.

¹¹ CGR (2019) *Exploring flexible working practice in schools: Literature review*. DfE, p.25.

¹² CGR (2019) *Exploring flexible working practice in schools: Literature review*. DfE, p.49.

Practical steps you can take towards successful job shares

The following table provides key questions and considerations that will support school leaders and teachers gain a shared understanding of how to achieve a successful job share.

Considerations	Questions to ask
Accountability and information handover	<p>Discuss answers and record agreements in writing. Add in any extra questions that refer to tasks that are particular to your school.</p> <p>Are responsibilities (for example, teachers' planning and marking) going to be shared or divided?</p> <p>Will job descriptions remain the same or will they change?</p> <p>Will performance management and accountability arrangements be adjusted or remain the same?</p> <p>How will quality and continuity for students be ensured?</p> <p>How will information be handed over from one day/session to the next?</p>
For teachers: Assessment, recording and reporting	<p>How will parents'/carers' evenings and reports be managed and shared?</p> <p>How will marking and assessment be managed and shared?</p> <p>How will data entry be managed and shared?</p>
Meetings, communications and key stakeholders	<p>How will attendance at meetings and training days be managed and shared?</p> <p>Will there be a physical or online space for sharing of communications and documents?</p> <p>Is there a suitable internal communications system to ensure each job share partner is kept fully informed and up-to-date?</p> <p>Will there be a main point of contact for parents/carers and other stakeholders, such as governors or outside agencies? How will communications to and from stakeholders be managed and shared?</p>
Non-working day considerations	<p>There may be rare or emergency situations (for example related to safeguarding) where partners on a job share</p>

	<p>may need to be contacted on their day off. Is there clarity on what constitutes an emergency?</p> <p>What potential deadlines or important events will occur on the teacher or leaders' non-working day? What ramifications might this have? What is the expected level of responsiveness on a non-working day in non-emergency circumstances? How will this occur (text, call, email)?</p>
Other duties and considerations	<p>How will school duties be managed and shared?</p> <p>Will there be an arrangement related to school trips and visits?</p> <p>Will there be any flexibility built in for swapping of days to accommodate additional events or trips?</p> <p>What arrangements are currently in place for part-time staff who are asked to work on their day off? (extra payment, time off in lieu?)</p>
If one partner resigns or leaves	<p>Will the job share partner be offered the remaining hours in the first instance / the chance to go full-time?</p> <p>What will be the strategy if recruitment to the vacant hours is not possible?</p>
What if one partner is off on long term sick or maternity?	<p>Will the partner be given the option to cover the absence on a temporary basis?</p> <p>Does the partner have a duty to assist the replacement with induction and help them to settle in?</p>
Costs	<p>Will it cost more?</p> <p>If so, do the benefits outweigh the costs?</p>

Handovers

Handover between job share partners can be an important element of a successful arrangement. Prior to starting a job share, it is useful to consider the following questions.

Questions about the handover process

- How much time does the handover require?
- What documentation or information needs to be provided to ensure the handover can be successful?
- Is the handover going to be in person, by telephone or virtual? How will a record be kept?
- How often will the handover be reviewed? How will you know if the handover is successful?
- What will be the signs if the handover is not going well? What is the planned strategy for if the handover proves to be unsuccessful?

Review

It is important to review any new working arrangements to ensure that they are working for those involved, colleagues and parents/carers and pupils. Collating regular feedback will ensure that key risks and challenges are identified and managed early before they become problematic. Job share arrangements should be discussed as part of the performance management review cycle.

Pilot Resource 3: A guide to home or remote working for pilot schools

A guide to home or remote working for pilot schools: introduction and purpose

This resource has been developed as part of the flexible working pilot, which forms the last phase of the research project exploring flexible working practice in schools, commissioned to CooperGibson Research (CGR) by the Department for Education (DfE).

This guide outlines the benefits and challenges of homeworking¹³ for teachers and school leaders. It has been developed to support schools when introducing or managing homeworking arrangements. It is designed to help schools to consider homeworking as a potential solution to providing a better work-life balance, supporting well-being of their staff and potentially to address recruitment and retention issues.

¹³ Homeworking is used throughout the document to refer to home or remote working.

A guide to home or remote working for pilot schools

The benefits of homeworking

Although the advantages of flexible working are well documented¹⁴, homeworking may not seem to lend itself so easily to teaching. However, while regular homeworking may not be practical for all teachers, there are many schools which find offering some homeworking opportunities very beneficial. In their study of homeworking, Acas¹⁵ reported that:

‘Contrary to assumptions that a constant physical presence in the workplace is required for maximum job performance, the study found that performance is slightly higher for partial homeworkers and mobile workers.’

They also concluded that:

- Partial homeworkers and mobile workers reported higher job satisfaction and engagement with their jobs than any of their colleagues.
- Homeworking and partial homeworking are linked to significantly lower levels of work-related stress than those experienced by office workers.

Like flexible working more generally, other benefits of homeworking might include:

- Greater focus on specific tasks, with an efficient and cost-effective way of working.¹⁶
- Happier staff, greater retention, lower absence rates.
- Tasks completed to a higher standard and within deadlines.
- More and higher quality applicants for vacancies.

¹⁴ For example, see DfE (2017) *Flexible working in schools: Guidance for local authorities, maintained schools, academies and free schools*.

¹⁵ The Advisory, Conciliation and Arbitration Service (Acas) provides free and impartial information and advice to employers and employees on workplace relations and employment law. Beauregard A, Basile K and Canonico E (2013) *Home is where the work is: A new study of homeworking in Acas – and beyond*, p5. Acas. This research was based on studying homeworking within Acas, plus four case studies of external organisations, and a literature review of academic research on homeworking.

¹⁶ NUT (undated) *Work-life balance: Guidance on developing policies for school, para 30*.

Examples of homeworking in schools

- Teachers take Planning, Preparation and Assessment (PPA) time at home. Some schools schedule PPA time for a morning or afternoon to facilitate homeworking.
- Teachers who have additional responsibility for leadership and management do some of these tasks from home. In some instances, this could mean coming into school later, leaving earlier, or spending whole mornings, afternoons or a day, working at home.
- Senior leaders undertake strategic tasks at home without disruption.
- Job share partners take time 'off-site' to meet for their handover or to plan remotely.
- Specific days at home to plan or work 'on significant curriculum projects...provided that such days are agreed in advance, recorded in the office calendar, and that staff are contactable at home during school hours'.¹⁷

The challenges

Whilst there are benefits, decisions about homeworking should also consider implications for the school. Key questions for the school are:

- Can the role/task be performed just as well (or better) away from the school, than if completed on the school site?
- What is the implication of having fewer adults present and visible in school?
- How will the homeworker keep in touch? How often will they keep in touch?
- Will the homeworker be available to come into school if needed?
- What aspects of school life, including communications, collaboration and meetings, will the homeworker miss out on? How can this be managed?
- Are there systems in place (such as information technology (IT)) to ensure homeworking can be carried out efficiently?

¹⁷ NUT (undated) *Work-life balance: Guidance on developing policies for schools*, para 29.

What can schools do to help make it work?

To ensure homeworking is beneficial to the teacher or senior leader and the school, there are a number of practical steps to take both before you implement homeworking and while it is in place.

Practical steps to take before implementing homeworking:

- Ensure your flexible working policy includes a section on homeworking, including how to make requests, conditions for consideration, timescales for decisions and clarity on the nature of the arrangement (i.e. contractual or informal). The flexible working policy should allow for requests for homeworking to be reviewed on a case-by-case basis, weighing up the benefits and detriments of the proposed arrangements.
- Communicate the school's support for homeworking to staff and invite staff to contribute to a flexible-working discussion group.
- Communicate the school's support of homeworking (and other types of flexible working) in job adverts, application packs and on the school's website.
- Set up appropriate IT systems so that homeworkers can access shared documents and files in real time and can use IT to communicate virtually.
- Ensure those working from home have the appropriate equipment, facilities and a safe and appropriate environment, to enable them to work effectively and complete relevant tasks.
- Have a clear agreement with homeworkers on what can be done at home verses in school.

Practical steps to take while homeworking is taking place:

- Ensure homeworkers can reach their managers in case of an emergency.
- Make sure homeworkers know who to contact and how to contact them if they have any questions or if they need help.
- Ensure that the homeworker receives the same communication messages as staff in school.
- Ensure staff are confident in use of appropriate IT systems to enable them to work effectively and provide support/training where required.
- Review the ongoing reliability of IT systems for the homeworker and ensure appropriate systems are in place for safe storage and transfer of data.
- Review the effectiveness of the homeworking arrangements at agreed milestones.



Department
for Education

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Reference: DFE-RR1083

ISBN: 978-1-83870-117-8

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