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| **Public Health Wales logo** |
| |  |  |  | | --- | --- | --- | | **Redeployment Policy** | | | | **Policy type:** Public Health Wales Local Policy | | | | **Policy reference number:** PHW09 | | | | **Policy classification:** Workforce | | | | **Author:** Karen Williams, Head of Corporate Workforce | | | | **Policy lead:** Karen Williams, Head of Corporate Workforce | | | | **Executive lead:** Hywel Daniel, Interim Director of People and OD | | | | **Date:** 01 April 2016 | **Version:** 1 | | | **Publication/ Distribution:** Public Health Wales (Intranet) | | | | **Review Date:** March 2019 **Approval date:** 28 April 2016 | | **Approval date:** 28 April 2016 | | **Approving body:** Public Health Wales Board | | | | **Purpose and Summary of Document:**  To provide clear advice, support and guidance to managers and employees regarding their role(s) in managing situations where employees need to be transferred into suitable alternative posts, thereby minimising the incidence of dismissal arising from organisational change, ill-health, capability, redundancy etc. | | | | **Intended audience:** All staff employed by Public Health Wales | | | | **Interdependencies with other policies:** All Wales Organisational Change policy, Sickness Absence policy, Capability policy, All Wales Dignity at Work policy, Redundancy policy, Disciplinary policy. | | | |  | | | |  | | | |

**Policy consultation circulation list**

|  |  |
| --- | --- |
| **Group/Lead policy circulated to** | **Date circulated** |
| Policy Consultation Workshop | 08/03/16 |
| Information Governance | 15/03/16 |
| JNC | 22/03/16 |
| Executive Team | 06/04/16 |
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# Policy Summary and Introduction

1.1 Redeployment is the process by which suitable alternative employment is sought for employees who are, for a variety of reasons, unable to carry out the duties of their current post, either permanently or temporarily.

1.2 Redeployment is referred to in a number of existing policies e.g. All Wales Organisational Change, Sickness Absence, Managing Performance, Dignity at Work, Security of Employment and Redundancy and Disciplinary. This policy is designed to provide a framework and process for re-deployment in conjunction with these policies and any other situation where re-deployment is appropriate. This policy does not supersede any of the policies outlined above.

1.3 There is an expectation that all staff, including Directors and line managers co-operate in the implementation of this policy in order to enable Public Health Wales to fulfil its obligations to its employees.

1.4 This policy relates to redeployment within Public Health Wales but account will also be taken of circumstances where there may be opportunities to redeploy staff elsewhere within the NHS in Wales. Similarly, there may be occasions where staff from elsewhere in NHS Wales may seek re-deployment within Public Health Wales. Such situations will be managed by the relevant NHS Trust Workforce department in the first instance.

# 2. Aims and Objectives

2.1The main aim of the policy is to consider redeployment as an option in order to retain staff and to enable them to remain within the employment of Public Health Walesby moving them to an alternative vacant post which is more suited to their needs and/or abilities, or because it is no longer tenable for them to remain where they are.

* 1. The objectives of the policy are:-

(i) To provide clear advice, support and guidance to managers and employees regarding their role(s) in managing situations where employees need to be transferred into suitable alternative posts;

(ii) To outline the redeployment procedure to be followed.

(iii) To thereby minimise the incidence of dismissal arising from organisational change, ill-health, capability, redundancy etc.

# 3. Scope

3.1 There are many eventualities whereby redeployment might be necessary for example:

1. Long Term Sickness;
2. Frequent Short Term Sickness;
3. Health issues directly relating to an individual’s occupation;
4. Where downgrading is needed due to capability issues;
5. Potential redundancy situations;
6. Flexible working requests/work life balance issues;
7. As an outcome of a Disciplinary Hearing;
8. Where conflict resolution e.g. related to Dignity at Work issues has not been possible, and Divisional Directors, Senior Managers and Senior HR staff consider that redeployment is an appropriate option to safeguard the team/department, service provision and/or health of individuals concerned;
9. Where relationships have irretrievably broken down;
10. After a secondment or a Career Break, where the post has changed or could not be held vacant;
11. End of a fixed term contract

3.2 Where redeployment situations occur as a result of any of the above then alternatives in type, hours, location and nature of work, should be considered by the manager and the employee with the advice of HR. Occupational Health advice will also be sought in situations relating to the ill-health of employees.

3.3 Opportunities will be actively sought for a maximum period of up to 12 weeks once an individual has been placed on the Redeployment Register. This period may include time spent in a temporary post or a secondment, but will exclude any trial periods.

3.4 Dependent on the circumstances of the case this period may be extended beyond 12 weeks following discussion between the line manager, Senior HR Adviser and trade union representative/staff side representative/work colleague. Conversely in some circumstances the period will be less than 12 weeks in line with accrued notice periods.

3.5 Where possible, a vacant post should be identified as appropriate for redeployment before it is advertised and the Workforce Department will monitor vacancies and assess against the Redeployment Register. However it is recognised that this process may not always be full-proof and the employee concerned is also expected to monitor any PHW vacancies on “NHS Jobs”.

3.6 The member of staff concerned should access the ”NHS Jobs” website on a weekly basis and immediately inform the Workforce Department should they see any Public Health Wales posts in which they are interested.

3.7 Promotional posts will not normally be considered for redeployment although there may be occasions when a move results in a Pay Band overlap to a higher banded post. Posts will be considered for redeployment if they fall within the same or one lower Pay Band.

3.8 Unless on health grounds or requested/agreed to by the member of staff, redeployments will not normally be to posts which are more than one A4C band lower.

3.9 Where a member of staff who becomes/is disabled needs adjustments made to enable them to transfer into another post, specialist advice will be sought in relation to their practical needs which may be accessed through Occupational Health or from external sources, for example the Disability Employment Advisor (Employment Service), Shaw Trust, Remploy Interwork or particular organisations/charities. For further guidance please see Appendix 8 – Reasonable Adjustments.

3.10 Where the member of staff is working whilst seeking redeployment, consideration and/or support will be given to provide reasonable paid time off for relevant training, visits, research and interviews.

3.11 In cases of capability due to ill-health, should the 12 weeks redeployment period has come to an end with no success and the contract of employment has to be terminated, the employee may continue to seek redeployment within Public Health Walesduring their notice period, with appropriate support and advice continuing as before. Should a suitable opportunity then be identified, the notice period will be extended to accommodate the trial period.

3.12 In addition to the NHS Wales Organisational Change Policy (2009), other Public Health Wales Policies/Protocols/Guidelines may need to be cross referenced when considering redeployment.

# 4. Roles and Responsibilities

4.1 Whilst the process of attempting to find a redeployment opportunity is coordinated by Human Resources, the responsibility and ownership for actions taken is fully shared with the relevant Directors and Managers as well as with the individual concerned.

## 4.2 Line Managers

4.2.1 It is important that managers are clear on the principles underlying this process, the procedure to be followed, and that staff are treated fairly and equitably.

4.2.2 Managers must make every effort to consider the appointment of re-deployees before considering any other applicant(s) and ideally before a post is advertised.

4.2.3 The advantages to the receiving manager are that the person may be able to start with minimal delay as no notice period is needed in some circumstances, they may have experience of working in Public Health Wales or from another NHS Trust, some additional funding may be available to them from the originating manager and there is the provision of a trial period.

## 4.3 Employees

4.3.1 The individual concerned is expected to take all possible steps to consider options, participate in training provided by Public Health Wales, and pursue opportunities which may be suitable in whatever way appropriate.

4.3.2 Employees who are on the Redeployment Register will be expected to regularly monitor Public Health Wales vacancies on NHS Jobs.

4.3.3 An employee is encouraged to contact their trade union representative or staff side representative for advice and support if they are a member of a trade union.

## 4.4 Human Resources

4.4.1 The Workforce Department will be responsible for operationally managing the Redeployment Scheme. This will include the maintenance of a fully up to date Redeployment Register that will be held within Human Resources.

4.4.2`The Workforce Department will:

* monitor vacancies against the Redeployment Register in order to identify potential redeployment opportunities;
* provide staff on the Register with all necessary and relevant information, in respect of re-deployment opportunities, to assist them to assess and make an informed decision regarding the suitability of a post;
* assess with staff, and the line manager, the suitability of vacancies with particular reference to the person specification, job description and any other relevant vacancy information available;
* contact the line manager if they fail to shortlist a member of staff for an identified suitable re-deployment vacancy, to ensure the matter is investigated and resolved appropriately and in a timely manner;
* provide support and work closely with staff on the Register to assist them to secure re-deployment;
* ensure the timely provision of feedback following informal interviews;
* advise the member of staff to contact a trade union representative for advice and support.

# 5. Occupational Health Services

5.1 Occupational Health advice will be sought where appropriate on such issues as capabilities, nature of duties and hours of work etc.

5.2 Where a temporary reduction in hours is recommended by Occupational Health in order to facilitate a gradual return to full duties, reference should be made to the Sickness Absence Policy and rehabilitation back into the workplace following sickness absence.

# 6. Procedure to be followed

6.1 The employee will complete a Redeployment Record Pro Forma (Appendix 1) to indicate the type of redeployment that might be suitable. In determining suitability, consideration will be given to many factors including the following:

1. Qualifications, skills and experience;
2. Preferences as to future employment/career;
3. Current salary/grade;
4. Location flexibility/accessibility;
5. Hours of work;
6. Medical condition/fitness.

6.2 They will then be placed on the Redeployment Register held within the Workforce Department. New vacancies will then be checked against the Redeployment Register on a weekly basis.

6.3 If a post is considered potentially suitable for the individual seeking redeployment, it will be brought to their attention by the Senior Human Resources Adviser who will arrange for them to receive the job description and person specification.

6.4 If the employee expresses a positive interest they should complete a job application form within 7 days and return it to the Senior Human Resources Adviser who will then forward to the relevant appointing manager. The employee’s current manager will be required to provide a reference using the standard documentation.

6.5 The individual will then be fast-tracked for an interview provided they meet the essential criteria for the post. **The appointing manager will be required to put the recruitment process on hold until the individual has been given proper consideration for the vacant post.**

6.6 If the individual is deemed suitable for the post, a trial period will be arranged (see section 9 below).

6.7 If the appointing manager is able to demonstrate, on objective grounds, that a post identified as potentially suitable for the individual is not in fact suitable then evidence to support this decision must be submitted to the Senior HR Adviser (Appendix 4- Feedback Form). This information will be shared with the individual.

6.8 If the individual rejects an offer of redeployment and it is considered by the employer that the post was in fact a suitable alternative, it will be noted that the offer was refused including the reasons given. This may impact on the employee’s eligibility for further redeployment opportunities.

6.9 Successful redeployment into a new post will be confirmed in writing (Appendix 7) and the employee will be issued with a revised contract of employment.

6.10 If a member of staff is currently on maternity leave and looking for suitable alternative employment due to the end of a fixed term contract, then during their maternity leave they are not expected to have to apply or attend interviews. They have enhanced rights under Regulation 10 of the Maternity and Parental Leave Regulations 1999.

# 7. Trial Periods

7.1 Redeployment will be subject to a trial period of not less than 4 weeks and normally no more than 3 months. Details will be confirmed in a letter to the individual, copied to both managers involved (Appendix 5).

7.2 Depending on the circumstances it may be necessary and appropriate to extend the trial period. However a trial period will not be extended beyond 6 months.

7.3 If all parties agree that redeployment is not working out, the trial period can be ended earlier or if everything is going well the person can be confirmed in post sooner.

7.4 If a redeployment trial period is unsuccessful, normally one further opportunity will be sought for the employee concerned i.e. a total of two redeployment opportunities.

7.5 Following the trial period, if an offer of redeployment to a post which is considered by the employer to be appropriate and reasonable, is rejected by the individual then no further redeployment opportunities will be offered.

7.6 Appropriate training or retraining will be offered to assist with redeployment into a specific post. There will be ongoing support and performance management e.g. workplace induction, objective setting, agreed criteria for success. As a minimum, the manager will conduct a review of the re-deployment, halfway through the trial period. Reviews by Occupational Health will also be obtained if appropriate.

7.7 A formal review meeting at the end of the trial period will take place to discuss the re-deployment and to decide if the move should be made permanent. The Senior HR Adviser will be present at this meeting. The member of staff has the right to be accompanied by a Trade Union/Staff Organisation Representative or a work colleague. These arrangements are confirmed in writing (Appendix 6).

7.8 Where a trial period is unsuccessful, details of the reasons why it failed must be recorded in the notes of the review meeting and retained by Human Resources. The employee will return to the re-deployment process, normally for one further attempt at re-deployment.

7.9 If the trial period proves satisfactory to all parties, the redeployment will be made permanent.

# 8. Pay, Protection and other Terms

8.1 With the exception of redeployment due to capability or disciplinary issues, during a trial period, the individual's pay will continue as if the individual was in work in their existing substantive post. Redeployment due to capability or disciplinary issues may result in no pay protection being provided. Advice should be sought from the Senior HR Adviser in such situations.

8.2 The originating and receiving managers should, in consultation with the Senior HR Adviser, agree such details as the funding of the trial period (including any essential training required), allocation of outstanding annual leave and length of the trial period.

8.3 Where the redeployment is only required for a limited time, such as in cases of rehabilitation back to work following ill-health then the employee’s substantive post will be kept open.

8.4 Where the post available for secondment is temporary or a secondment then the employees’ substantive post will be kept open for them, if appropriate, and other substantive options will continue to be sought.

8.5 With the exception of redundancy situations, excess travel and car parking expenses are payable for the trial period only.

8.6 Protection of pay will only apply in cases of re-deployment as a result of sickness, organisational change or where the employee is a victim of bullying and harassment under the terms of the Dignity at Work Policy.

8.7 If redeployment is to a lower A4C pay band then the appointment will be made to the highest available point of the pay band allowable under NHS Terms and Conditions of Service Handbook.

8.8 If a member of staff wishes to be redeployed into a post which is more than one A4C band lower than their current substantive post, this will not be deemed to be a ‘suitable alternative post’and negotiation between the manager and member of staff will take place to agree a reasonable level of protection in these circumstances. Any such situations MUST be referred to the relevant Senior Human Resources Adviser.

8.9 Once an employee has undertaken one trial period then for any subsequent trial periods the period of pay protection will be reduced accordingly.

8.10 Where the reason for redeployment is due to ill-health and is being managed under the All Wales Sickness Absence Policy with Occupational Health advice, the individual will, if appropriate, receive short-term protection of earnings in accordance with the NHS Terms and Conditions.

# 9. Communication to staff

* 1. This policy will be made available to all staff via the Intranet.

# 10. Monitoring and auditing

## The policy lead will monitor this policy to ensure it is compliant with current legislation, to ensure it is effectively implemented, and ensure that it is reviewed in accordance with the policy review timetable.

# Review

## This policy will be reviewed in 3 years time or sooner if required.

# Information Governance Statement

## This policy does not introduce any additional or special information governance or privacy issues or risks beyond those already inherent in the Human Resource forms detailed within this policy.  It should be noted that all forms / letters detailed in the appendices to this policy should be treated as confidential and dealt with in the appropriate manner. Managers should not take local copies of these forms / letters and should ensure that all forms / letters are held by the Workforce department.

# 13. Appendices

Appendix 1- Re-deployment Record Pro-forma

Appendix 2 - Manager’s Checklist for informal/fast-track interview when considering a member of staff for a trial redeployment period

Appendix 3 - Letter to Occupational Health requesting advice on the suitability of a post for redeployment

Appendix 4 - Consideration of redeployment – feedback form

Appendix 5 - Standard letter for trial redeployment period

Appendix 6 - Letter confirming trial redeployment period review meeting and Pro-forma

Appendix 7 - Standard letter to confirm redeployment to new substantive post

Appendix 8 - Reasonable adjustments – Single Equality Act 2010

**Appendix 1 - Re-deployment Record Pro-forma**

**STRICTLY PRIVATE AND CONFIDENTIAL**

**RE-DEPLOYMENT RECORD PRO-FORMA**

|  |  |
| --- | --- |
| **Employee’s**  **Full Name** |  |
| **Payroll Number** |  |
| **Employee’s Personal Contact Details** | **Address:**  **Post Code:**  **Telephone:** |
| **Current Job Title** |  |
| **Current Pay Band / Grade** |  |
| **Current Hours of Work** | **Days worked** |
| **Current Work Address** |  |
| **Any Special Circumstances** |  |
| **Current Manager’s Name and Contact Details** |  |
| **Date of meeting** |  |

**NB THIS PAGE WILL BE STORED WITHIN THE**

**HUMAN RESOURCES DEPARTMENT**

**THIS INFORMATION WILL ONLY BE ACCESSIBLE BY THE HUMAN RESOURCES DEPARTMENT FOR PUBLIC HEALTH WALES**

**Please insert the following details in respect of the above employee:**

|  |  |
| --- | --- |
| **Details of Knowledge**  **Training and previous work Experience** |  |
| **Details of Qualifications** |  |
| **Details of the Employee’s Skills** |  |
| **Personal Circumstances that the employee would like to be considered during the Re-deployment Process e.g. caring responsibilities, ability to travel etc.** |  |

|  |
| --- |
| **Support Arrangements** |
| Detail any support arrangements the employee would like to receive, if relevant |
|  |
|  |
|  |
|  |
|  |
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|  |
|  |
|  |

**Re-deployment:** (to be completed by the Regional Human Resources Officer)

|  |  |  |
| --- | --- | --- |
|  | YES | NO |
| **Has employee been entered onto the Re-deployment Register?** |  |  |

**Employee Signature: .........................................................**

**Print Name: ..................................................**

**Date: ............................................................**

**SHRA Signature : .........................................................**

**Print Name: ..................................................**

**Date: ............................................................**

**Appendix 2 - Manager’s Checklist for informal/fast-track interview when considering a member of staff for a trial redeployment period**

**MANAGER’S CHECKLIST**

**INFORMAL/FAST-TRACK INTERVIEW WHEN CONSIDERING A MEMBER OF STAFF FOR A TRIAL REDEPLOYMENT PERIOD**

Discuss

1. **The job**

(i) Job Description/Person Specification.

(ii) Skills / competencies required.

(iii) The Department and work team.

(iv) Full time or part time etc.

(v) Working arrangements.

(vi) Arrange Informal visit to the area.

2. **The person**

1. Application form and employment history, experience, skills, etc.
2. Health problems / limitations or adjustments.
3. Occupational Health advice and confirmation post is suitable.
4. Any other reasons for redeployment (non-health) or important managerial issues e.g. disciplinary warnings, NMC/HPC.

3. **Practical issues**

(i) Training needs and how to meet these.

(ii) Pay protection.

(iii) Coming back into work gradually.

(iv) Trial period – length, funding, objectives, mentor, competencies, extension, what happens at the end i.e. formal review.

(v) When can they start?

**Appendix 3 - Letter to Occupational Health requesting advice on the suitability of a post for redeployment**

**Private & Confidential**

<Date>

<Name>

<Address>

Dear <name>

**Re:**

You last reviewed this <member of staff job title> from Dept/Div on <date>. Prior to this you had seen him/her on <date> due to <condition/reasons> and your report recommended permanent redeployment to suitable alternative duties within Public Health Walesand that he/she should not return to work to his/her former post.

A substantive post has now been offered to him/her on a <x week> trial redeployment period with effect from <date>.

I am enclosing a job description, person specification and KSF outline for the post of <new job title, grade, dept>. Please could you inform me of the suitability of the post for <name> with regard to his/her health problem(s)/disability and/or medication.

Many thanks.

Yours sincerely

**<Name>**

**Human Resources**

**Appendix 4 - Consideration of redeployment – feedback form**

**CONSIDERATION FOR REDEPLOYMENT - FEEDBACK FORM**

(To be used following prior consideration/application & fast track interview)

**Employee Name: ………………………………………….…………………..**

**Current Post/Grade: ………………………………………………………….**

**Dept/Div: ………………………………………………….……………………..**

**Post sought for Trial redeployment: ………………………………….…**

**Date of informal/fast-track interview: ………………………………..**

This form is to be completed by managers who are required to consider an employee for a trial redeployment period. The form is intended to provide documentation to evidence that sufficient, fair and objective consideration has been given to staff seeking redeployment opportunities and to make feedback available which can be used to assist the employee in identifying skills and training needs to help them in securing a successful redeployment.

Redeployment is an option which should be considered in order to retain staff and to enable them to remain within the employment of Public Health Walesby moving them to an alternative post which is more suited to their needs and/or abilities, or because it is no longer tenable for them to remain where they are.

If the individual potentially meets the definition of disability contained in the Single Equality Act 2010, Public Health Waleshas a positive duty under the legislation, supported by case law, to make reasonable adjustments to ensure that they remain in employment wherever feasible, and this includes seeking alternative work (see Appendix 8). This may require a manager to treat a disabled person more favourably to remove the disadvantage attributable to the disability.

Where an employee is identified for redeployment they will be fast-tracked for an interview provided they meet the essential criteria for the post. Where the individual is not deemed suitable Section A of this form should be completed by the manager from the appropriate area.

Similarly, if the individual rejects an offer of redeployment, it will be noted in Section B that the offer was refused, including the reasons given by the individual.

***If you have any questions in relation to this form then please contact the Human Resources Department.***

SECTION A

**Manager’s comments in respect of the employee (refer to the person specification where appropriate).**

|  |  |
| --- | --- |
| Qualifications |  |
| Experience |  |
| Skills |  |
| Special Knowledge |  |
| Personal Qualities |  |
| Training required to be successful in this role |  |
| General Comments/other reasons |  |

**Successful: Yes/No**

Manager’s signature:……………………………………………. Date:…………………………

Printed name and title:………………………………………………………………………………..

**SECTION B**

**To be completed by member of staff rejecting an offer of redeployment**

**Reasons for not accepting an offer of a trial redeployment period:-**

…………………………………………………………………………………………………………………………

………………………………………………………………………………………………………………………..

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………………………………………………………………………………………………………….…………….

……………………………………………………………………………………………………………..…………

…………………………………………………………………………………………………………………………

Member of staff’s signature: ………………………………………………………..……………

Printed Name and Job Title: ………………………………………………………………………..

Date: …………………………………

**Completed Form to be returned to the**

**Human Resources DepartmentAppendix 5 - Standard letter for trial redeployment period**

<Date>

<Name>

<Address>

Dear

I write following your recent discussions with <current manager> and <new receiving manager>, concerning your trial redeployment to the <new department>. I was very pleased that a post had been found which may meet your needs and enable you to continue in employment in Public Health Wales.

I formally confirm that with effect from <start date> you will commence a trial period of redeployment to the post of <new post – job title and grade> within the <new department> at <new base>. At the end of this period a joint decision will be made as to whether this will become your substantive post.

Your hours will be the hours for the new post, i.e. <c> hours per week and how these are worked should be arranged with <new manager>. The principal duties and responsibilities are outlined in the job description which I believe you have already received/is attached.

I have sent the job description for the post to <doctor dealing with the case>, in the Occupational Health Department to ensure that he/she feels this is an appropriate placement in relation to your health and/or medication.

A <z> week (*generally 12 weeks, may be 4 to 26 weeks*) trial period has been agreed and informal reviews of your progress, providing ongoing support and training / performance management as necessary, will take place on a regular basis. Please ensure that either <new manager> or <current manager> are notified if you consider that the duties of the post are causing you any problems. A formal review of the arrangement will be held at the end of the <z> weeks, with a member of staff from Human Resources present, and you will have the right to be accompanied at the meeting by a representative of a Trade Union/Staff Organisation, colleague, relative or friend.

As this is a temporary arrangement at present, your existing substantive post remains that of a <current job title and grade>. For the trial period therefore, you will continue to be paid this salary and any regular additional payments that you would have received, in accordance with All Wales Protection Agreement.

If you have any queries relating to the above, please do not hesitate to contact me on extension <telephone number>.

Yours sincerely

**<Name>**

**Human Resources Officer /Assistant Human Resources Manager**

**<Service Group>**

c.c. Originating Manager

Receiving Manager

***N.B. Change form needed***

**Appendix 6 - Letter confirming trial redeployment period review meeting and Pro-forma**

**Private and Confidential**

<Date>

<Name>

<Address>

Dear <Name>

Your 12-week trial re-deployment period in the post of <Job Title>, <Grade>, <Department>, at <l> is due to end on <Date>.

A formal review meeting has therefore been scheduled to take place on <Date>, at <Time>, in the <Venue>. In attendance at the meeting with you will be, <Name>, <Job Title>, and myself.

You have the right to be accompanied by a representative of a Trade Union or Professional Organisation, or a friend, relative or colleague. We have ensured that <Trade Union Rep> is available to attend.

If you have any queries relating to the above, please do not hesitate to contact me on extension <Extension No>.

Yours sincerely

**<Receiving Manager’s Name>**

**<Job Title>**

**<Department>**

c.c. Trade Union Rep

Human Resources Manager/Human Resources Officer

Originating Manager

**TRIAL PERIOD REVIEW MEETING PROFORMA**

**To be completed by the Appointing Manager with the Appointee**

|  |  |
| --- | --- |
| **Employee’s Name:** |  |
| **Job Title of identified Post and Ref. Number:** |  |
| **Department and Location of the Post:** |  |
| **Agreed length of trial period:** |  |
| **Date trial period due to end:** |  |
| **The agreed criteria by which the manager and the appointee will judge suitability of the post during the trial period:** | Agreed reasonable performance targets  **<Insert>**  **Post criteria / Requirements**  **knowledge, skills, qualifications, experience, appointee’s competence to perform the task, duties contained in the job description**  **<Insert>** |

|  |  |
| --- | --- |
| **Date of Meeting:** |  |
| **In Attendance at the Meeting:** |  |

|  |  |  |
| --- | --- | --- |
|  | **Yes** | **No** |
| **Is employee working well in the role?**  **If no, reasons and actions to support improvement** |  |  |
| **Is employee receiving enough support and guidance?**  **If no, detail employee concerns and actions to address** |  |  |
| **Does the employee have training / retraining needs within the new post?**  **If yes details and actions to address** |  |  |
| **If training or retraining needs have been identified, does the**  **length of the trial period need to be extended?**  **If yes, insert details of agreed extended trial period.** | | |

|  |  |  |
| --- | --- | --- |
| **Are there any other issues to be discussed with the employee?**  **If yes, please insert the details and note any agreed actions and timescales:** |  |  |
| **Are there any other issues which the employee wishes to raise?**  **If yes, please insert the details and note any agreed actions and timescales:** |  |  | |
| **Date of the next review meeting:** | | | |
| **Appointing Officer’s Signature: Date:** | | | |
| **Employee’s Signature: Date:** | | | |

**A COPY OF THIS COMPLETED FORM TO BE RETURNED TO**

**THE Workforce Department**

**Appendix 7 - Standard letter to confirm redeployment to new substantive post**

**(Paragraphs to be used or deleted as appropriate in each individual case)**

<Name>

<Address>

<Date>

Dear <Name>

Subsequent to the letter dated <Date> regarding your redeployment to <new Dept>, I write to confirm that the <x> week trial period has been completed. A formal review meeting was held on <date> with <new manager name>, <new manager job title and Division/Dept>, <Supervisor/mentor name and job title>, and myself. [Mention TU rep if present]. <*Example - All aspects of your skills and working relationships were more than satisfactory. You, in turn, confirmed that you were happy in your new work area, finding the work interesting and less stressful, and the department supportive and highly professional.>*

I am pleased to confirm that your substantive redeployment to the post of <grade> <job title> in the < Dept> is confirmed with effect from <Date>. In this new post you will be placed on the <relevant Agenda for Change <Band>, i.e. <£ bottom incr - £ top incr> per annum and on the <zth> incremental point of the scale, subject to verification by Payroll Department, working <full time/part-time> hours.

***(Delete as appropriate****)* *As there is a decrease in salary as a consequence of this redeployment which has taken place under the All Wales Sickness Absence Policy, your previous salary i.e. <£ > per annum and any regular additional payments you would have received in your previous post, will continue to be paid for <y> months.*

***(Delete as appropriate****)* *If you are a member of the NHS Pension Scheme you may choose to preserve your benefits earned at the higher salary, provided that you have at least 2 years membership in the scheme and that you write to the Payroll Services Department within one month of the reduction of earnings requesting that your benefits be preserved. The Payroll Services Department will then contact the NHS Pensions Agency on your behalf.*

Your other Terms and Conditions of Employment remain unchanged ***or*** you will transfer onto Agenda for Change NHS Terms and Conditions of Service *(delete as appropriate)* and you will automatically continue in the NHS Pension scheme unless you have informed us of your wish to opt out*. You will receive a new Principal Statement of Main Terms and Particulars of Employment in the near future.*

The Payroll Department has been notified of this change and will make the necessary adjustments to their records. I should be grateful if you would confirm your acceptance of this contractual change in writing.

Yours sincerely

**<Name>**

**Human Resources Officer / Human Resources Manager**

c.c. Originating Manager

Receiving Manager

Payroll Services Department

***N.B. Change form needed, specifying protection***

**Appendix 8 - Reasonable adjustments – Single Equality Act 2010**

**REASONABLE ADJUSTMENTS – Single Equality Act 2010**

1. Throughout the application of this Policy, due regard must be given to the Single Equality Act 2010. Public Health Walesrecognises that a disability should not bar a person from employment unless it would genuinely and significantly impede that person from doing the job in question, and there is nothing that Public Health Walescan reasonably do to overcome this. A disabled person must be given equal opportunities to take up employment and take up training opportunities even when adjustments would require treating that person more favourably than others.
2. Definition

The Single Equality Act 2010 define a disabled person as anyone with a physical or mental impairment, which has a substantial and long-term adverse effect on their ability to carry out normal day to day activities.

(i) Physical Impairment includes, for instance, a weakening of part of the body caused through illness, by accident or congenitally.

(ii) Mental Impairment includes a clinically well recognised mental illness, or learning disability.

(iii) Substantial means that the effect is more than minor or trivial, but it does not have to be severe.

(iv) Long-term adverse effect means that the effect has lasted or is likely to last for at least 12 months, and the effect is a detrimental one. A person whose life expectancy is less than 12 months is also covered if the effect is likely to last for the whole of that time.

(v) Normal day to day activity means something that is carried out by most people on a fairly regular and frequent basis.

Under the Acts, the person may be affected in one of the following respects:

(i) Mobility

(ii) Manual dexterity

(iii) Continence

(iv) Physical co-ordination

(v) Ability to lift, carry or move everyday objects

(vi) Speech, hearing or eyesight

(vii) Memory or ability to concentrate, learn or understand

(viii) Perception of the risk or physical danger

Also covered by the Acts are:

(i) Recurring or fluctuating conditions such as arthritis

(ii) Conditions which progressively deteriorate such as multiple sclerosis, HIV and cancer

(iii) Severe disfigurements

1. Reasonableness

Reasonable adjustments will be made to working conditions where these would otherwise place a disabled person at a substantial disadvantage. Less favourable treatment of a disabled person for a reason related to the disability cannot be justified where the reason for the treatment can be removed, or made less than substantial, by reasonable adjustment. In determining the reasonableness of a proposed adjustment the following will be considered:

(i) The effectiveness of the adjustment in preventing the disadvantage

(ii) The extent to which it is practicable to make the adjustment

(iii) The effects on the service provided

(iv) Financial and other costs including any options for assistance (for example, via the Disability Advisory Service)

1. Advice

Where an employee has, through sickness or accident become disabled, Public Health Wales will assess the potential to retain the person in employment, either within the post currently occupied or in another identified and suitable role. Advice on the implications of the Disability Discrimination Acts should be sought at any stage of the application of the Sickness Policy from a Human Resources Manager/member of the Human Resources Department or from Trade Union or Professional Organisation representatives. The employee will be offered input from the Disability Advisory Service who will advise on work place adjustments, and where necessary possible alternative employment options. In certain cases, the Disability Advisory Service will contribute to the purchase of specific equipment or other workplace adjustments, which will enable the person to continue in employment. The employee will be involved in all of the above processes.