

Issue No. 095/2025 | 16 May 2025

## TO EE CONSUMER BRANCHES

Dear Colleague

### EE Consumer - Team Based Scheduling Agreement – Annex B ECOH

The CWU Consumer National Team are conducting a ballot of Consumer branches around acceptance of the improvements that have been made to Annex B of the Team based scheduling agreement (see attached).

The CWU National Team have given the Regional Co-ordinators regular updates on the progress of the flexible working trials and provided details of the trial managers and guidance on the information and checks we wanted you to discuss and report back.

The National Team has received no negative feedback, the number of applications has increased and the annex has been amended to capture the improvements listed below;

- 1) No restrictions on tenure, members can apply for flexibility on day one of their employment.
- 2) No time limits to review ECOH (supported flexibility) agreements previously 24 months.
- 3) Local flexibility agreements automatically agreed as long as within 20% shift fit.
- 4) Full access to heat maps and call patterns.
- 5) Written confirmation and details of where agreements will be stored.

In addition, the appeal has been maintained in the agreement.

The ballot will be conducted via Survey Gizmo and you will be sent a vote.

The ballot will close on Thursday 22 May 2025 at 12:00 noon.

A copy of the agreement is attached. Please note that this agreement is not for further distribution.

Yours sincerely

**Stephen Albon**  
National Officer

Attachment:



LTB 095.2025a  
Consumer Team Based

# **BT CONSUMER CUSTOMER CARE**

## **Team Based Scheduling Collective Agreement**

### **1. Scope**

- a) This is a collective agreement between BT (the Company) and the Communication Workers Union (the CWU or the Union)
- b) The Agreement provides a standard attendance pattern framework which will be implemented fairly and consistently for all Team Members based on quantifiable business unit and functional requirements.
- c) BT will ensure that the terms of the Agreement are adhered to at all levels.
- d) The scope and application of the Agreement may vary across business units and work streams depending on customer and business requirements. This will require both BT Consumer and the CWU to enter into timely and meaningful consultation to work toward reaching agreement within determined timescales. This is detailed at Section 3.
- e) For non-customer facing teams, existing patterns apply but may be subject to change in the future in line with this Agreement. The current list is as follows: Planning, Technology & Analytics, Training, and support functions.

### **2. Attendance arrangements**

#### **2.1– Attendance Principles**

As a result of this Collective Agreement there is no change to individuals weekly contracted hours of employment. This Collective Agreement means all Team Members in BT Customer Care will have a harmonised framework of attendance.

The Attendance Framework will cover the period Monday to Sunday 7am to 11pm, with attendances scheduled within hours that match the demands of customers, and opening hours of the business. In doing this BT will continue to recognise the need for a good work life balance. A late attendance will be defined as any attendance after 6pm.

This Agreement covers all BT Team Members in BT Consumer Customer Care. It supersedes and replaces all previous agreements on attendance patterns and associated terms and conditions of employment in BT Consumer Customer Care including shift working framework arrangements and associated allowances contained in NewGRID (save for those expressly referred to within this Agreement). In the event that the Agreement is terminated NewGRID would apply.

Sunday, Bank holiday, 24-hour shifts and night attendance remuneration arrangements will remain unchanged and are covered by the appropriate premia arrangements as set out in Group policies. The Group Compensation for loss of attendance related payments (CLARPS) arrangements will also apply.

Attendances will be arranged to ensure that wherever possible, teams are scheduled to attend work on the same attendance patterns. Team-based scheduling will enhance team working and ensure that there is improved opportunity to coach and support advisors

It is accepted that team-based scheduling may not be possible in all cases and in some cases, teams will comprise a mixture of full and part time advisors. In this instance the part time attendances will normally be the same as the full-time staff on days which the part timers attend.

The Company will develop attendance patterns in line with the following principles while ensuring that they deliver as close an alignment as possible between customer demand and advisor attendances. The aim will be to deliver this within a 0.5% tolerance (+/- supply vs demand).

The principles are as follows.

- a) BT will maximise the number of patterns that provide 2 consecutive days off.
- b) BT will maximise the number of weekends off to be full weekends and wherever possible extend to longer weekend breaks.
- c) Patterns will follow a 2-, 3- or 4-week cycle, within which start times and RDO will be defined (subject to Bank Holiday arrangements set out in 2.4 below). The number of hours worked in each week of the cycle may be more or less than an individual's weekly contracted hours, but over the complete cycle they will equate to the total number of contracted hours applicable for the relevant period.
- d) Full-time patterns will be a mix of 12,10,8-hour options however this will be dependent upon size of area & opening hours.
- e) Patterns will normally rotate through an early / late ordering. Other options will be available.
- f) Part-time patterns will mirror full time 12,10,8-hour patterns to enable mixed full time and part time teams, where needed, so enabling team intactness between mixed contract hours.
- g) Part-time shifts of 30 hours for 12 hour and 10-hour daily patterns will have a maximum of 4-day attendances and 3-day alternatives will be available (but there will be limited numbers available on 3 days). For 8-hour daily patterns we will maximise the number of 3 and 4 days per week attendances
- h) On part-time shifts of less than 30 hours BT will maximise the number of 3-day attendances.
- i) Consecutive attendances will not exceed 6 days in a row (any pattern with a 6-day run will have 3 consecutive days off elsewhere in the rotation).
- j) Part-Time patterns below 30 hours will include one option with a consistent weekday off where possible (there will limited availability dependent upon area size & part time population).
- k) Where the company introduces a new pattern BT will offer these internally first.
- l) The minimum number of attendances per week will normally be three. Any two-day attendance patterns that are in place at the time of the Agreement will continue.

- m) Attendance on any one day will be continuous unless a Team Member volunteers to work a split shift arrangement.
- n) Any change to attendance will be compliant with applicable legislation (e.g. Working Time Regulations and Flexible Working Regulations).
- o) To ensure compliance with Working Time Regulations for all attendances there will be a minimum gap of 11 hours between end and start times. For Team Members who are classified as young workers under the age of 18 their break will be a minimum of 12 hours and two consecutive days off every week.
- p) There will be no compulsion for part-timers or job sharers to make the same number of attendances per week as their full-time colleagues.
- q) BT will enable the attendance patterns can be operated on a job share basis, and in line with the Job Share Agreement.
- r) BT will maximise attendances which are suitable for couples and car sharers to work the same attendances and in the case of couples opposite shifts.
- s) No one shall be required to work a pattern based on a 12-hour daily attendance unless they volunteer for such a pattern, or they are new hires externally recruited specifically for that pattern. BT will particularly support those who work a 12-hour daily attendance and seek to ensure that the long days do not lead to a negative impact on their health and wellbeing. If an individual finds themselves struggling in this pattern, every support will be given to help them settle into the pattern. If this does not resolve the situation, they will have a 121 with their manager to request a change to an alternative pattern and the manager will arrange an appropriate change in patterns.
- t) If an individual wishes to volunteer to change their attendance pattern within their operational area and site to another existing pattern and there are no current vacancies, BT will operate a waiting list and when a vacancy occurs advisors on the list will be offered the option of moving to their requested pattern based on the order of application. If a vacancy becomes available and the advisor at the top has changed their mind, then the company will move to the next advisor on list.

## **2.2 The Working Day - Start and Finish Times**

The scheduled span time for Monday to Sunday attendance will be between 07.00 hours and 23.00 hours. Where night working arrangements are in place these will continue in accordance with NewGRID.

This does not mean that every operational area will be open for all these hours. The exact opening times for sites/operational area will depend on operational requirements.

## **2.3 Adjustments to Attendance Patterns and Personal Circumstances**

There are a number of policies in place to support individuals who have personal circumstances that mean they require short term and long-term adjustments to their attendance patterns. These are detailed below.

- a) Swaps made temporarily. Team Members may swap their attendances or arrange for a colleague on the same queue to cover. This will be managed in line with current

processes and policies. See Annex A for the for the Swap process in BT Consumer Customer Care.

- b) An Exceptional Change of Hours (ECOH), process will be available where, because of welfare, health personal or domestic circumstances e.g. caring responsibilities etc., individuals may not be able to work a standard attendance pattern (see Annex B).
- c) The option of a formal Gov.UK Flexible Working request is also available under the terms of the relevant legislation.
- d) Duty Pay Back Arrangements and Special Leave arrangements are unchanged by this agreement and will continue to be available.
- e) Apply for a BT Passport.
- f) Request a permanent change in contractual hours.

## **2.4 Bank Holidays**

BT will seek to cover all Bank Holidays by volunteers in the first instance. However, in the event there are insufficient volunteers BT staff may be required to attend. The process for resourcing Bank Holidays is set out in Annex C.

## **2.5 Breaks**

Breaks will be arranged in accordance with Annex D and BT will also adhere to legislation concerning meal breaks for those under 18 years of age.

## **2.6 Flexi Breaks**

Flexi Break arrangements will be introduced in all areas that operate Team Based Scheduling. This will be introduced following the introduction of the agreement and the deployment of Team-based scheduling. The full details are shown in Annex E.

## **2.7 FlexiTime**

FlexiTime arrangements will be introduced in all areas that operate Team-based scheduling. This will be introduced within six months of the deployment of Team-based scheduling in an operational area. The full details are shown in Annex F.

## **2.8 Overtime**

Current overtime arrangements and Group policy remain unchanged as a result of this agreement.

## **2.9 Short Term Cover**

Team Members carrying out short term cover to a job in a higher salary range in line with NewGRID, will adopt the attendance portfolio of the role they are covering unless a variation is agreed in advance by the First Line Manager. They will also receive the appropriate cover payment plus a contingency bonus if they normally work in a role that attracts a bonus, plus any appropriate attendance payments such as the Sunday Attendance payment.

In the event that a Team Member who does not normally receive a bonus was carrying out short term cover in an area where bonus was normally available to Team Members, then they would also receive a contingency bonus.

## **2.10 Initial Attendance Portfolios**

A set of attendance patterns have been developed in line with the principles above and these are set out in Annex G and will be implemented as part of this Agreement.

## **3. Process for Changing Attendance Arrangements**

### **3.1 Initial Implementation of the Agreement**

- a) Team Members will be able to opt for variety of attendance portfolios for which they can state two preferences from the options outlined in 2.10 above.
- b) BT will review the outcome of the preference exercise and attempt as far as possible to match the patterns in each site and operational area to the preferences.
- c) BT's objective will be to give Team Members their first option from the two they are able to select. If the first option is not available, then BT will attempt to try to achieve the second. However, it is recognised that for operational reasons this may not always be possible to get the first or second preference – primarily due to either oversubscription or viability. Where neither preference is achieved a 1-2-1 will be held with the individual to try and find a solution which will explore all options.
- d) Where there is an oversubscription BT will consider the business impacts of increasing the availability of options to better meet people preferences.
- e) BT will operate the preference process set out in Annex H which will take into account both preferences and existing attendances.
- f) Those functions detailed in Section 1e are excluded from this initial roll out. In the event that team-based scheduling is required in some or any of these areas then this will be the subject of timely and meaningful consultation and are covered by this Agreement.
- g) Prior to implementation of the new attendance portfolio employees will receive 10 weeks formal written notice of the change. The notice period will only commence once an individual's attendance pattern has been formally confirmed in writing.
- h) BT is keen to ensure that people are not financially disadvantaged from working less Sundays as part of the implementation of this agreement. Advisors should opt for patterns that include Sunday working to maintain annual income. However, if an individual ends up on a pattern with less than their existing number of Sundays and wants to continue with their current number this will be accommodated if they so wish.
- i) People who work non-standard contractual hours (e.g. 17, 19 or 22.5 hours), will retain those hours. They will not be included in the preference exercise but will have a 1-2-1 with their Line Manager to consider moving to one of the available patterns nearest to their contracted hours. The new pattern would be adjusted to reflect the existing contractual hours.
- j) If an individual moves to a pattern that involves a reduction in Sunday payments, then CLARPS will apply. The notice for CLARPS would be on the date of the letter detailed in para 3.1g above.

- k) Any pre booked annual leave will be honoured. In addition, where advisors find that they will now be working when they previously were not due to, BT will allow for extra annual leave available to ensure that pre booked commitments such as holidays or weddings can be met. For example, if someone has a holiday booked around a day they were due to be off, and that day is now due to be worked then BT will allow more time to be taken.
- l) All ECOH and flexibility arrangements in place at that time of the transition to the new attendance portfolios will be honoured. All cases will be reviewed in accordance with current timescales and the individual's arrangements.
- m) Individuals who are currently on an active ECOH or flexibility option, will have a 1-2-1 discussion with their Line Manager and choose one of the new portfolios if they wish. If an individual gives up an ECOH or flexibility option and moves onto a new standard pattern they will be protected on that new attendance for the duration of their existing ECOH/flexibility option.
- n) Job Share arrangements will remain in place. Job Share staff will participate in the preference exercise which will take into account the established job share arrangements.
- o) Any arrangements established under the Gov.UK Flexible Working legislation will not change as part of this agreement unless a request is made by the individual under the ECOH process. Individuals will have a 1-2-1 discussion with their Line Manager and choose one of the new portfolios if they wish. If an individual gives up a Flexible Working arrangement and moves onto a new standard pattern they will be protected on that new attendance for the duration of 24 months.
- p) BT will ensure the effective handover of any individual's BT Passport between existing and new Line Managers, ensuring no change to any existing agreed adjustments.
- q) Once the individual's attendance pattern has been established BT will send a letter within 30 days confirming their new attendance portfolio and any associated changes to their terms and conditions of employment.

### **3.2 Future Changes to Attendance Patterns**

- a) BT will hold resourcing reviews with the CWU National Team on a monthly basis. This will consider the latest customer demand and associated attendance analysis across all functions including the latest ECOH/flexibility options position and recruitment plans. The meeting will keep the attendance patterns under review and identify any areas of potential concern and consider the best way to address them.
- b) BT and the CWU recognise that there will be times when attendances will need to be adjusted to ensure customer service is maintained and the right levels of resource are available to meet demand. Changes can be caused by a variety of issues including but not limited to changes in customer calling patterns, new products or existing products ceasing, and alterations to call duration. Any new patterns will adhere to the principles set out in Section 2.
- c) Before any change is sought to attendances BT will consider whether the change in customer demand is permanent and also other resourcing options.
- d) For any permanent changes to attendance arrangements, timely and meaningful consultation will take place with the CWU, at national level. This will work toward reaching agreement as soon as the business need can be quantified. BT will provide

the CWU with relevant operational information demonstrating the need for the change. The data will include the numbers and current attendances of staff affected, current levels of overtime working, the sites impacted and the possible impact on advisors.

- e) Volunteers will be sought in the first instance to attend the revised attendance patterns.
- f) Every reasonable effort will be made to avoid a change to the current number of days an advisor will attend or the number of hours they work a day.
- g) Any changes will not be outside the 7am to 11pm span of attendance and will not increase weekly contractual hours.
- h) Any change by BT that results in a reduction of Sunday payments then CLARPS will apply.
- i) Any changes will take into account any domestic and personal circumstances in line with 2.3 above. Any ECOH/flexibility option or formal Gov.UK flexible working arrangements in place at the time of a change will be honoured and will be reviewed in line with existing timescales. However, anyone with an ECOH in scope will be given the opportunity to choose to move onto the new pattern and remain on that new pattern for the period that the existing ECOH exists for.
- j) Notice periods are set out below:
  - For permanent major changes in the attendance patterns that would lead to, but not be limited to the following examples of scheduling changes: change to number of attendances a week; changes to rest day arrangements; changes in the overall number of late attendances, changes to the overall number of weekend attendances; changes in site opening hours; or weekend patterns, individuals would receive 6 weeks written notice of change. If the company found it needed further permanent changes in the 12 months following a change where 6 weeks notice had been given, for any subsequent notice of change, individuals would receive 12 weeks notice.
  - Notice of any such change would only be issued after timely and meaningful consultation with the CWU National Team, on the proposed changes during which both parties will seek to reach an agreement.
  - At any stage during the consultation period, should discussions not be making appropriate progress, either party can escalate the matter through the agreed escalation process set out in Section 5.

#### **4. Transfers into Consumer**

Team Members who are transferred into BT Consumer from other parts of the BT Group will be offered a choice of one of the standard attendance pattern options of their function subject to a minimum of 12 weeks formal written notice.

The principles of welfare, health, personal or domestic circumstances as outlined above will apply in accordance with the ECOH process and other associated processes in BT Consumer Care.



## **5. Escalation Process**

- a) In the event of any matter not being resolved at functional level between CWU and BT Consumer the matter will be escalated as follows by either party as follows.

### **Stage 1**

If the issue is at site level, this will be dealt with the Senior HRBP and CWU Regional Co-Ordinator. If the issue involves more than one site, an interpretation of the Agreement or cannot be resolved it should be escalated to Stage 2.

### **Stage 2**

The next level of escalation will be to BT Employee Relations and the CWU Consumer National Team.

### **Stage 3**

The final stage would be escalation BT Consumer Employee Relations Director and the Deputy General Secretary (Telecoms & Financial Services) for immediate attention. BT Consumer and the CWU will seek to reach agreement. This review will normally be completed within one week of the escalation.

- b) While the escalation process is in operation the status quo will prevail. Status quo is defined as the situation that prevailed before the change or action that is the subject of the escalation.
- c) The parties may move to another stage of the relevant procedure, if it is mutually agreed that this would prove useful or if either party concludes no more progress can be achieved at the existing stage.
- d) The escalation timescales can be extended by mutual agreement.

## **6. Review, Amendment and Termination**

BT Consumer and the CWU jointly commit to reviewing this agreement 6 months after the initial allocation and thereafter on an annual basis.

The terms of this agreement may be amended by mutual agreement of both parties and may be terminated with 6 months notice by either party. Termination will not occur unless the issue has already been considered at Stage 2 and 3 of the escalation process above.

## **7. Signature**

Signed on behalf of the CWU and BT.

-----

**Nigel Cotgrove**  
**CWU Assistant Secretary**

**Date:** .....

-----

**Chris Amos**  
**BT Employee Relations Director**

**Date:** .....

## **Annex A**

### **Duty Swap Process**

This document sets out the policy for a Team Member who requests a duty swap. BT Consumer acknowledges that there will be times when a Team Member, for personal or social reasons, wants to have the option to swap their scheduled attendance shift with another colleague.

This process is to ensure that swaps in scheduled attendance patterns are fair and equitable without any risk in meeting the requirements of BT's customers.

The process to request a change to an attendance schedule is built on the following guiding principles.

- a) Where an attendance is swapped it must be for same attendance shift i.e. number of hours.
- b) Both Team Members must be matched within the same skill set/Queue/Camp, but this does not necessarily need to be from the same site.
- c) All attendance patterns that are swapped on a scheduled Rota Day Off must be paid back within a 4-week window where the swap is with another BT Team Member.
- d) All attendance patterns that are swapped on a scheduled Rota Day Off must be paid back within one week where the swap is made with an Agency Team Member.
- e) Where a Team Member requests a swap, but no suitable match can be identified they will be expected to attend their normal working shift.
- f) Where a Team Member successfully identifies a suitable match, they will be expected to attend the alternative schedule as a normal working day. In the event they are absent normal absence policies will apply.
- g) Swaps can be made for attendances that involve Bank/Public Holidays.

BT will put in place suitable systems to support the swap process.

Line Managers will support Team Members and help to facilitate swaps.

## **Annex B**

# **EE Flexibility Options and Gov.UK Flexible Working Policy EE (legacy BT)**

## **Section 1: Introduction and Key Principles**

### **1.1 Introduction**

This document covers:

- EE flexibility options, temporary changes of hours, temporary changes of attendance & emergency changes of hours
- Gov.UK flexible working request (FWR) in line with relevant legislation.

It is BT's objective to ensure that employees feel confident to request change via company internal processes rather than revert to the more formal Gov.UK Flexible Working requests.

This document replaces all previous versions of this policy.

Any legacy Exceptional Change of Hours arrangements that are in place at the date of this document will continue and will be reviewed in lines with agreed timescales.

The forms to be completed to request one of the EE flexibility options will be the subject of consultation with the CWU at a national level

### **1.2 The Formal Flexibility Options Process**

BT understands that individual circumstances can change and wants to support those advisors who are no longer able to work their contracted hours or existing attendance on a short-term or long-term basis.

All requests will be treated consistently and fairly and a final decision reached on the basis of the information provided to assess each case on its merits. Where possible all requests will be accommodated and a solution found in line with the data we provide, e.g. heat maps and shift fits.

Advisors should discuss the issue with their Line Manager before making a formal request.

EE flexibility option requests are submitted for a number of reasons. Some are for temporary changes which are required for a limited period and others are based on a longer-term requirement and even permanent.

Examples of why an individual would seek a change to their current working pattern are as follows (this list is not exhaustive):

- Health or medical condition
- Changes to arrangements for childcare
- Caring due to a change in circumstances
- Transport to and from work
- Urgent domestic distress
- Further Education
- Maternity returning to work
- Long Term Sickness and returning to work
- Student term/timetable changes

### **1.3 The Key Principles**

- a) Requests to move away from standard attendance patterns established under Team Based Scheduling will be considered for exceptional reasons. Where Team Based Scheduling is not in operation the request will relate to their current pattern.
- b) There is no requirement for minimum tenure before an EE flexibility option request can be made
- c) If an advisor needs to change their attendance pattern, then they should first consider whether they can work one of the other patterns operating in their operational area.
- d) When considering one of the EE formal flexibility options or Gov.UK flexible working request managers should disregard any issues related to the advisor's general performance. Only specific details in relation to their request should be considered.
- e) BT Customer Care will seek to avoid bespoke attendances where possible
- f) BT will endeavour to keep changes to the standard hours of 16, 18, 20, 25, 30, 36 & 37.5 hours, however in exceptional circumstances BT will consider other hours of attendance.
- g) The EE supported flexibility option represents a long-term change to the existing attendance pattern, typically lasting longer than 6 months. As this is a long-term change, there may be no end date. The line manager should discuss the attendance pattern at appropriate intervals to ensure it still provides the necessary support.
- h) EE flexibility option requests can be made as and when they need to, in line with personal circumstances. Two Gov.UK flexible working requests can be submitted in any 12-month period
- i) EE flexibility option requests can be made as and when they need to, in line
- j) The reason for the change does not need to be disclosed beyond the conversation with the line manager
- k) BT will ensure that where an EE flexibility option or Gov.UK flexible working request is put in place this will be documented and stored on My HR, and the advisor will be given written confirmation of the arrangements by email. If there is a change to these arrangements, BT will inform the guide.
- l) In the event that an individual's flexibility option or Gov.UK FWR request is rejected, an appeal should be facilitated, as per standard BT process.
- m) BT will share data with the CWU nationally on a monthly basis showing the number of cases submitted. Local data will be shared as part of the monthly together meetings and will be managed locally between the site Contact Centre Manager and local branch.

## **Section 2: EE Flexibility Options**

### **2.1 EE Flexibility Options**

- a) EE Flexibility requests should be submitted where an advisor can no longer work their normal attendance patterns due personal difficulties attending work (e.g. health, caring including childcare issues).

- b) EE Flexibility options can include temporary reductions in hours or changes in attendance patterns, changes of days worked, fixed attendance patterns, fixed breaks, a reduction in the number of days worked, change of start or finish times on particular days. This list is not exhaustive.
- c) Advisors should normally discuss their application with their Line Manager in the first instance before it is submitted. However, where the issue relates to a sensitive medical condition or issue an advisor might want to approach a different Manager or HR.
- d) The decision maker and the individual will be provided with access to resources, including heat maps and shift fits, to assist them in considering the impact of any change in attendance pattern, especially where the supported flexibility option is requested.
- e) The Line Manager will receive the request and will hold a 1:1 with the advisor to discuss the options.
- f) Where that is not possible for an advisor to work their current pattern BT will explore options to either remain within existing team with an adjustment to that pattern or move to another team with an adjustment to that pattern.
- g) Where possible, any EE flexibility pattern will be expected to fit with customer demand. The Planning team will provide guidance on this. Where that is not possible, a decision can be made to offer a bespoke pattern following the EE supported flexibility option principles.
- h) The final decision will rest with the line manager in line with personal and business needs and in line with the attendance principles
- i) Where one of the EE flexibility options is agreed, BT will normally allocate the advisor to the team within their operational area that works a pattern closest to the EE flexibility option arrangements.
- j) At the end of the EE flexibility agreement, the guide will revert to their previous attendance pattern, if it still exists, or they will be offered the closest match

## **2.2 EE Flexibility Options Review**

There is no requirement to review short-term EE flexibility option arrangements. Long-term changes should be reviewed with the advisor as appropriate to establish the following:

- If the EE flexibility option is operating properly and providing the support the advisor expected.
- If the change was agreed for health reasons, is the change is having a positive effect on the advisor's attendance and general wellbeing?
- Have the circumstances under which the change was agreed changed?
- Can the advisor return to a standard attendance pattern? If possible, to agree a return to normal attendance ahead of the review date.
- The Line Manager will review existing portfolios with the advisor to assess if any are suitable.
- LM should diarise the review date 2 weeks before agreed end date to discuss reverting to normal attendance pattern or extension to allow the planning team to action.

Colleague attendance pattern will automatically revert to normal attendance pattern at the agreed end date if the planning team are not informed of any extension with the exception of the supported flexibility option.

- Where an advisor is seeking to extend a current EE flexibility option related to health and an individual's health condition has not changed and the previously agreed arrangements are still needed, then the EE flexibility option process will be extended to accommodate the changes to attendance in such cases. In these circumstances it is not appropriate for Line Managers to seek to change current arrangements.
- If the advisor's situation changes, it is the Line Manager's responsibility to ensure this is documented and, where appropriate, inform the planning team.

### **Section 3 Gov.UK Flexible Working**

#### **3.1 Gov.UK Flexible Working requests are requested under the legislation.**

This is a formal process and timescales to be operated when a request for a permanent Change of Hours under the flexible working legislation is received. Decisions on the outcome of a flexible working request will be made by Centre Managers, with support from HR and Planning.

This is a totally separate process to EE flexibility options and where changes via this process are being sought, managers should refer to the following.

The process for making requests for Gov.UK Flexible Working made under the Employment Act 2002 or Work & Families Act 2006 is shown below.

- a) Making a request for Gov.UK flexible working is straight forward. Advisors will need to put their request in writing using the Formal Flex Change request form (which should be completed in full) or by providing equivalent information in an email or letter and sending it to your manager. The request would usually be for a permanent change
- b) The Act defines how requests should be made, how and by when they should be considered and how decisions should be communicated.
- c) In order to meet the requirements of the Act, it is important to use the standard forms to make and respond to requests. An advisor should do the following:
  - Read and understand the terms of flexible working.
  - Ensure that a Formal Flex Change is the right process for them based on the terms & conditions and their individual needs.
  - Approach their manager and discuss their needs via a 1-2-1.
  - Complete the Formal Flex Change form capturing all the required information needed.
- d) The Line Manager submits the Formal Flex Change request, with any other relevant documentation, to the Ops Manager for a decision.
- e) The Ops Manager will review the request and make a decision to accept or reject with support from Planning and HR. This decision is sent to the relevant Planning e-mail account to build the attendance and HR Services for any contractual amendments.
- f) The following rules apply to any Formal Flex Change:
  - Formal Flex Changes must be reviewed, a documented meeting to take place to discuss the request and a decision provided back within 2 months to the advisor, except for Northern Ireland where this is 28 days.

- If a Formal Flex change is declined, the Ops Manager must provide a business rationale as to why and be able to substantiate it via a written letter using some or all of the 8 accepted business reasons. Planning and HR will assist the Ops Manager if required.
- g) The advisor no longer has the statutory right to an appeal against a decline. However, providing an appeal process demonstrates that BT is handling requests in a reasonable manner. The appeal will be heard by a manager of higher grade.
- h) Two formal flex changes can be requested in any 12-month period, regardless of whether it was declined or accepted.
- i) If an advisor has applied for a formal flex change which has been agreed, and has now established that it is no longer suitable, they may apply for one of the EE flexibility options. There is no guarantee that the EE flexibility option change requested will be agreed. However, if the EE flexibility option is accepted then they must withdraw from the Formal Flex change process.

For further details on the process, timescales and applicable forms.

- <https://www.gov.uk/flexible-working/overview>
- <http://www.nidirect.gov.uk/index/information-and-services/employment/employment-terms-and-conditions/working-hours/flexible-working/flexible-working-making-your-application.htm>

## **Section 4 Roles and Responsibilities**

### **4.1 The advisor's Role**

The advisor should discuss the issue with their Line Manager. If the issue is a sensitive issue individuals may approach another manager or HR and then complete the relevant documentation providing any information requested.

### **4.2 The First Line Manager's Role**

- a) The Line Manager should discuss the change of hours or attendance request in the first instance (unless the request is of a sensitive nature)
- b) Hold 1-2-1, which should be face to face wherever possible, and document the reasons for the request, details of the change being sought, and what the duration is. The aim of the meeting is to explore all attendance possibilities that the advisor can offer, to help make the decision on which EE flexibility option is appropriate.
- c) Be accessible to their team in terms of supporting and guiding advisors through this process, seeking clarification and guidance where necessary.
- d) For very short term requests the Line Managers should consider all available options such as swaps, casual leave, special leave, etc.
- e) The Line Manager will make the decision.
- f) Ensure that all relevant information that is required before a request is submitted.
- g) Carry out the agreed reviews in a timely and sensitive manner.
- h) The Line Manager will be responsible for communicating to the individual a start date and where appropriate, a review or end date. The start date would normally be within 2 weeks

from the change being agreed. In the interim period the new attendance will be accommodated locally.

- i) The Line Manager must ensure that any EE flexibility option or Gov.UK flexible working arrangement is properly documented, and that the advisor has a copy of the agreed arrangements. In the case of Formal Flex Change arrangements, this will include a contractual variation letter.

#### **4.3 The Ops Manager's Role**

- a) Be accessible to their team in terms of supporting and guiding Line Managers and advisors through this process, seeking clarification and guidance where necessary.
- b) To act as a personal guide for their Team Leaders and will coach and support them to make sure they are considering the relevant information
- c) To coach their team leaders to be able to have quality conversations
- d) To give guidance to help their team leaders to make their own decisions but will not make the decision for them.
- e) To support and promote flexibility within their community

### **Annex C**

#### **BT Consumer Bank Holiday / Public Holiday Resourcing Process**

This process supports the new attendance arrangements in BT Consumer Customer Care. Customer Care would prefer staff to attend on a voluntary basis and will endeavour to completely fill the Bank Holiday requirements through a voluntary approach. However, in the event that there are insufficient volunteers then any Team Member may need to attend work on a Bank Holiday.

In this document references to Bank Holidays also include Public Holidays.

#### **Standard Process**

The process will be as follows:

1. Every effort will be made to seek volunteers from the complete pool of Advisors required to work on all relevant sites and where it is appropriate contingency resource may be used.
2. BT will as far as possible spread any Bank Holiday work around different sites.
3. No volunteers will be turned down if mandating is required unless it is completely operationally non-viable.
4. Volunteers will be accepted in the order they apply.
5. 16 weeks out the process will commence and volunteers will be sought.
6. 12 weeks before the holiday the voluntary process will end and the resource available assessed for viability. Viability will be based on three key criteria:
  - Total level of volunteers versus requirement.
  - Skill sets of those that have volunteered.
  - Site by site viability (e.g. single individuals at single sites)
7. Once the number of viable volunteers has been confirmed the gap between the level of volunteers and requirement will be determined.



8. The gap will then be filled by Advisors who will be mandated to attend. In these instances, mandated Advisors will be advised 10 weeks out. This notification will include the hours that they are required.
9. Those mandated will be selected from the relevant pool of advisors on a random basis.
10. Individuals physically attending as a result of being mandated will be placed at the back of the queue for the next Bank Holiday – thereby creating a de facto rotation.
11. In the event that it is necessary to mandate individuals who have previously been mandated then previous attendance dates on Bank Holidays will be used to determine the order of mandating with the most recent attendees at the bottom of the rota. In the event that individuals to be mandated are at the same point on the rota, then there will be random selection.
12. Final notification will be confirmed 6 weeks out as part of the business-as-usual scheduling process
13. Once someone has been mandated to attend then it will still be possible for an individual to use the swap process as long as the full requirement has been met.
14. Bank holiday voluntary attendance will be broken down into shorter slots (e.g. 4 hours) to maximise voluntary attendance.
15. Mandated attendance would normally be for the attendance the individual would have worked on the day of the Bank Holiday.
16. BT will not mandate individuals to attend if this would be outside an individual's existing attendance portfolio unless the attendance requirement is changed as part of the Rostered Day Off (RDO) movement process.
17. Fixed RDOs will not normally be moved. If there is a requirement to make such a change prior consultation with the CWU will take place.
18. BT Consumer would expect Centre Managers to make balanced decisions when presented with cases where any individual has an exceptional reason for not attending and or changing their scheduled start and finish time (e.g. transport, caring arrangements, child custody, etc).

### **Scottish and Northern Ireland Holidays**

The standard process as set out above will apply to Bank Holiday arrangements in Northern Ireland and Scotland. The only difference being that we will make every effort to maximise attendances in other parts of BT to minimise the risk of having to mandate attendance in Scotland or Northern Ireland. This may include increasing attendance or reducing leave. Similarly, where there is a holiday in the rest of the UK but not Scotland BT will make every effort to maximise attendances in Scotland to minimise the risk of having to mandate attendance. This may include increasing attendance or reducing leave.

### **Christmas and New Year Process**

In respect of Bank/Public Holidays at Christmas and the New Year, including the Scottish New Year Bank Holiday, the standard process set out above will apply except that every effort will be made to seek volunteers earlier than the normal 16 weeks described above.

Attendances will be confirmed at least 10 weeks before the Bank Holiday.

Individuals attending work as a result of being mandated at Christmas and /or the New Year will be placed at the back of the queue for the next Christmas/New Year Bank Holiday. – Thereby creating a de facto bespoke rotation for the Christmas and New Year period – with the aim of, as far as possible, ensuring individuals do not have to work consecutive Christmases or New Years.

In addition:

- Every effort will be made within the selection process to avoid individuals being mandated to attend more than one Bank Holiday over this period (e.g. Christmas Day and Boxing Day).

- Where a Bank Holiday falls on a weekend day both the actual day of the holiday and its replacement will be treated as Bank Holidays for the purposes of scheduling and payments. This means BT will seek volunteers on both actual and replacement Bank Holidays.

## Remuneration & Time in lieu

Volunteers, who started at BT **before 1 July 2020**, who work their normal standard working day or more, will receive a time credit equal to their normal standard working day. If someone volunteers to work less than their normal standard working day, they'll receive a time credit equal to the hours they've worked on that day.

For employees who started with BT **from 1 July 2020**, their annual leave is credited at the start of the year for Bank Holidays, the table below shows how it would be debited if they work a bank holiday.

If they need to work time back, BT will base it on the length of their standard working day.

Listed below are some examples to help:

	Normal standard working day	Hours worked on Bank Holiday	Time credit for employees prior to 1 <sup>st</sup> July 2020	*Employees hired from 1 <sup>st</sup> July 2020
Volunteer	8	8	8	0 debited from annual leave
Volunteer	8	10	8	0 debited from annual leave
Volunteer	4	6	4	0 debited from annual leave
Volunteer	8	6	6	2 debited from annual leave
Mandated***	8	8	8	0 debited from annual leave
Mandated***	4	4	4	0 debited from annual leave
Volunteer/Mandated*** and stood down on the day by BT.	8	Due to work 10/12 but stood down by BT.	10/12	0 debited from annual leave

\*\*\*Anyone mandated will always be mandated to attend their normal working day

For all employees - anyone who volunteers to work the BH would be doing at the potential chance they'll work 6 days in a week if their RDO is not moved in line with the BH process. Anyone mandated will only work their standard amount of days in a week.

### What happens if a bank holiday falls on a RDO?

For colleagues who started before 1<sup>st</sup> July 2020 the following will apply:

If a bank holiday falls on their rota-day off (RDO) they will automatically receive a time credit based on the average daily hours worked per attendance. This is calculated by adding up all the hours worked in their TBS pattern (over 2 or 4 weeks) then dividing by the number of attendances (over 2 or 4 weeks)

For example, the pattern below there are 144 paid hours of work, divided by 16 attendances over 4 weeks which equals a 9-hour credit.

36 Hours – NG	Mon	Tue	Wed	Thu	Fri	Sat	Sun
43	9	9	OFF	OFF	9	8	8
26	10	OFF	OFF	OFF	8	8	OFF
36	OFF	9	9	9	9	OFF	OFF
39	10	10	10	9	OFF	OFF	OFF

They will receive this credit whether they volunteer to work or not and regardless of the number of hours they may volunteer for.

If they do volunteer to work a bank holiday which is their scheduled RDO, they will not receive any other time credit in addition to the one they have already received.

For colleagues who started from 1<sup>st</sup> July 2020 their annual leave balance will remain unchanged if a BH falls on an RDO.

### What happens if someone is mandated and there's a temporary change to opening hours for advisors hired before 1 July 2020?

Where the hours open are shorter than an advisors normal standard working day e.g. they're on a 12-hour pattern but the centre is only open for 8 hours, they'd get a time credit for their normal standard working day **and** can claim premium payment for the hours they have worked. They'll also receive normal payment for the hours that were scheduled but they didn't have to work.

**For example:** If they're mandated on a bank holiday and scheduled to work 12 hours but our centre is only open for 8, the following will apply:

- They'll receive time credit for 12 hours
- They'll be able to claim Premium Payment for 8 hours worked

- They'll receive normal pay for all 12 hours BAU

Planning will write out 16 weeks in advance to advise the opening hours for Bank Holidays and ask for volunteers

10 weeks in advance Planning will write out to confirm notice of people being mandated and opening times.

At 6 weeks all volunteers and mandates will be reflected in IEX

For any advisor whose schedule is impacted by early closure, they will have the following options available to them in order to pay back the hours they have not worked but have been paid for:

1. Pay time back
2. Take annual leave
3. Unpaid leave
4. If available use flexi-hours

This includes anyone being stood down on the day

**What happens if an advisor is mandated and there's a temporary change to opening hours for advisors hired after 1 July 2020?**

Where the hours BT is open are shorter than their normal standard working day e.g. they're on a 12-hour pattern but the centre is only open for 8 hours, they will receive normal payment for the hours that were scheduled but they didn't have to work.

**For example:** all Bank Holidays are normalised for advisors hired after 1 July 2020, with the exception of Christmas Day, Boxing Day or New Years Day, if they are mandated on a day and scheduled to work 12 hours but the centre is only open for 8 hours, the following will apply:

- They'll receive time credit for 12 hours (only applicable if they worked on Christmas Day, Boxing Day or New Years Day)
- They'll be able to claim Premium Payment for 8 hours worked (only applicable if they worked on Christmas Day, Boxing Day or New Years Day)
- They'll receive normal pay for all 12 hours BAU

Planning will write out 16 weeks in advance to advise the opening hours for Bank Holidays and ask for volunteers

10 weeks in advance Planning will write out to confirm notice of people being mandated and opening hours

At 6 weeks all volunteers and mandates will be reflected in IEX

For any advisor whose schedule is impacted by early closure of their site they will have the following options available to them in order to pay back the hours they have not worked but have been paid for:

1. Pay time back
2. Take annual leave
3. Unpaid leave
4. If available use flexi-hours

This includes anyone being stood down on the day

Standard BT policy will apply to Bank Holiday attendance both in terms of remuneration and the allocation of Bank Holiday credits.

### **Over Subscription**

In the event of more volunteers coming forward and or a reduction in expected demand the commensurate level of voluntary and/or mandated attendees will be reduced. This will be done as soon as possible.

The reduction will be completed across all relevant sites by each site being given an equal percentage of Advisors which the Centre Manager can stand down. However, nationally all mandated individuals in each work area will be stood down before volunteers are stood down.

In addition:

- The Centre Manager can also take into account any known issues with individual attendance.
- Anyone who has previously attended due to mandating will be stood down before those who have not previously been mandated.

If individuals are stood down by BT on the day of the Bank Holiday, then they will receive the whole Bank Holiday payment and time off in lieu equivalent to their entire shift. However, if opportunities are offered to leave early on a Bank Holiday and the individual chooses to take that opportunity, remuneration will equate to the hours actually worked.

### **ECOH/EE flexibility options and Gov. UK Flexible Working**

BT will not mandate individuals to attend where this would breach existing individual ECOH/EE Flexibility option or Gov.UK Flexible Working agreements.

### **Holiday Bookings**

Advisors will not be mandated to attend on Bank Holidays where the day has been booked off as part of an annual leave booking, or the Bank Holiday is immediately before or immediately after a period of annual leave.

## **Non-Attendance**

Non-attendance by either volunteers or mandated attendees will be managed under the appropriate HR process.

## **RDO Moves**

The above process will be run independently from the business-as-usual movement of Bank Holiday week RDOs.

RDOs in Bank Holiday weeks can be moved to the Bank Holiday day to maximise resource. If an individual is then mandated to attend on that Bank Holiday, then the original RDO is reinstated. If the move of an RDO clashes with a mandated attendance thereby generating a 6-day attendance (which is not part of their normal pattern) the original RDO will be honoured.

## **Shift Workers**

These arrangements do not affect formal shift rotas which cover Bank/Public Holidays.

## **Transport Difficulties**

If an individual is mandated to attend work, then BT will take into account situations where normal transport arrangements to and from work are not available. For example, this might be the non-availability of public transport or the fact that an individual cannot get their normal lift to work. In such case cases all reasonable transport alternatives (including the use of taxis which would be paid for by BT) will be explored and each case treated on its merits.

In the event that there is a tax liability incurred as a result of BT providing transport, then this will be met by BT.

All such issues will be dealt with at a site level and Ops Manager authorisation will be necessary for taxi provision.

## **Consultation**

Early and meaningful consultation will take place with the CWU at national level in relation to the Company's resource requirements to meet anticipated customer demand on Bank / Public holidays.

## **Annex D**

### **AGREEMENT ON WORK BREAKS IN BT CONSUMER**

#### **Agreement between BT Consumer and the CWU**

##### **1. Introduction**

This document sets out arrangements for breaks and meal breaks in BT Consumer Customer Care. The terms of this document reflect existing collective agreements with the CWU (including those on Display Screen Equipment breaks and NewGRID) and also includes revised options arrangements for lunch breaks.

The company will honour any existing variations of the standard breaks shown in the table in Appendix 1 of this document in operation at the 1<sup>st</sup> January 2020. If any Advisor volunteers to move to another attendance pattern after the initial implementation of this Agreement, they would move onto the standard breaks shown in Appendix 1. If, however,

any move is at the behest of the company, they would retain their current break structure. New employees post implementation of the Agreement will have breaks in line with Appendix 1.

## **2. Scope**

- a) The following arrangements apply to all BT Team Members working in BT Consumer Customer Care as a call centre advisor, including coaches or other Display Screen Equipment users when they are working online.
- b) These arrangements have been agreed jointly between BT and the CWU at national level. No local exceptions or alterations are permitted. Any alteration would be subject to negotiation between BT and the CWU at national level.

## **3. Lunch Breaks**

- a) In line with the NewGRID Agreement an unpaid meal break of at least 30 minutes will be scheduled following a maximum of 5 hours attendance. The meal break should be scheduled as far as possible in the middle of the daily attendance.
- b) For details of breaks are shown in Appendix 1.
- c) The company will honour any existing variations of the standard breaks shown in the table in Appendix 1 of this document in operation at the 1<sup>st</sup> January 2020. If any Advisor volunteers to move to another attendance pattern, after the initial implementation of this Agreement they would move onto the standard breaks shown in Appendix 1. If however any move is at the behest of the company, they would retain their current break structure. New employees post implementation of the Agreement will have breaks in line with Appendix 1.
- d) For those under the age of 18 the meal break – whether paid or unpaid - will be scheduled after no longer than 4.5 hours attendance.

## **4. Provision for Scheduled Breaks**

- a) A break of 15 minutes will be scheduled for morning, afternoon or evening. If a break is unable to start on time because a call is still in progress, the break starts when the call has finished.
- b) Eligibility will start at the minimum attendance of 2 hours 45 minutes and will apply to BT people whether full time or part time on scheduled attendance, overtime or FlexiTime.
- c) For those on Workforce 20/20 contracts the break will be unpaid. For all other contract types the Scheduled Breaks will be paid in line with this Agreement.
- d) The principle is that any attendance of 3 hours minimum must contain a scheduled break of 15 minutes. This applies to all Advisors regardless of whether they are entitled to a paid or unpaid break.
- e) The Scheduled Break arrangements shall be in addition to the meal break provision. For example, an Advisor starting work at 8am would have a break by 10.45 am at the latest and then a lunch break at 1pm at the latest. Similarly, if there are two lunch breaks within 2 hours and 45 minutes there shall be no need for a scheduled break in between.
- f) Scheduled Breaks should be linked to start and finish times of individuals.

- g) Breaks will not be scheduled at the start/end of attendance to shorten the working day.
- h) Wherever possible, breaks should be taken away from Display Screen Equipment.
- i) If overtime or FlexiTime is worked a rest period between the end of the duty and commencement of overtime may be required if maximum sit time would have otherwise been exceeded. The same principal may also apply where overtime or FlexiTime is worked prior to a scheduled attendance. If the level of overtime or FlexiTime worked in addition to that day's scheduled attendance exceeds 2 hours 45 mins BT will automatically insert a paid break for those who qualify for paid breaks, or an unpaid break.
- j) Where an overtime or FlexiTime duty of more than 2 hours 45 minutes is worked before or after the normal attendance, the Scheduled Break should be taken near the start or the finish of the overtime to prevent a long sit.

## **5. Informal Breaks/Rest Pauses**

- a) Individuals will also be able to take Informal Breaks, either away from the desk to obtain drinks etc. or pauses at the desk, to avoid the onset of fatigue. These will be recorded by the individual using the appropriate systems. Restrictions on numbers taking informal breaks/pauses or going to the toilet will not be applied; people will be expected to self-manage breaks and pauses in a responsible manner consistent with BT Values whilst maintaining their adherence levels.
- b) An Informal Break may also be appropriate in other circumstances such as after an abusive or distressing call with a customer.

## **6. Adherence**

- a) Adherence targets establish the proportion of time at work that an Advisor should be logged in to systems or participating in training/briefings. BT will set adherence targets for Advisors which allow sufficient time for reasonable levels of Informal Breaks.
- b) BT will keep these targets under review and will adjust the targets to reflect the nature of calls in individual operational areas, and to take into account the split lunch breaks.
- c) Failure to abide by Adherence targets will not be viewed as an automatic reason for disciplinary action. Adherence should be regarded as a background measure which should be viewed in conjunction the amount of time individuals have been working beyond scheduled attendances to the benefit of BT.
- d) Failure to meet adherence targets will initially be the subject of informal coaching and if necessary, a formal performance plan. However, persistent failure to meet adherence targets may be viewed as a disciplinary issue.
- e) Advisors will be encouraged to always take their full meal and Scheduled Break entitlements. Failure of advisors to take Scheduled Breaks will be viewed as an adherence failure by their Line Manager.

## **7. Arrangements for Part Day Attendances**

- a) When an Advisor takes a half day off for annual or special leave then the arrangements above would continue to apply provided that the half day attendance was at least 3 hours.

## **8. ECOH/Reasonable Adjustments**



- a) Nothing in this document will lead to a variation of arrangements in place for Exceptional Changes in Hours or reasonable adjustments linked to disability issues where those attendances require specific break arrangement.
- b) If an individual works reduced hours or different attendances as part of one of these arrangements which reduces the number of unpaid or paid breaks they are entitled to then if they revert to normal hours/attendances, they will be able to move back to the number of paid or unpaid breaks they were entitled to previously.

## **9. Training**

When Advisors are undertaking classroom training then individuals will be advised separately for each course of the break arrangements to allow the class to work the same breaks during the training period. Please note paid and/or unpaid breaks may not be required depending on the type and content of the course. However, lunch breaks will continue to follow the arrangements set out in Section 3 above and these lunch breaks will not total more than one hour in a day.

## **10. Log On/Log Off Agreement**

Nothing in this Agreement varies the Log On/Log Off Agreement.

## **11. Break Summary**

A summary of the standard break arrangements is contained in Appendix 1.

## **12. Terminology**

**Scheduled Breaks:** Are taken away from the workstation and are intended to give the individual time for a beverage and a snack if required.

**Informal Breaks:** Are taken in addition to Scheduled Breaks away from the workstation, for example, a comfort break.

## APPENDIX 1: STANDARD BREAK ARRANGEMENTS

LENGTH OF DUTY: PAID HOURS	WORKFORCE 20/20	ALL CONTRACTS EXCEPT WORKFORCE 20/20
2.45 – 5	<ul style="list-style-type: none"> <li>1 UNPAID BREAK</li> </ul>	<ul style="list-style-type: none"> <li>1 PAID BREAK</li> </ul>
Above 5 – 6	<ul style="list-style-type: none"> <li>1 UNPAID</li> <li>30 MIN UNPAID MEAL BREAK</li> </ul>	<ul style="list-style-type: none"> <li>1 PAID BREAK</li> <li>30 MIN UNPAID MEAL BREAK</li> </ul>
Above 6 - 8	<ul style="list-style-type: none"> <li>2 X UNPAID BREAKS</li> <li>30 MIN UNPAID MEAL BREAK</li> </ul>	<ul style="list-style-type: none"> <li>1 PAID BREAK</li> <li>60 MIN UNPAID MEAL BREAK</li> </ul>
Above 8 - 9.5 HOURS	<ul style="list-style-type: none"> <li>2 X UNPAID BREAKS</li> <li>30 MIN UNPAID MEAL BREAK</li> </ul>	<ul style="list-style-type: none"> <li>1 PAID BREAK</li> <li>2 X 30 MIN UNPAID MEAL BREAKS</li> </ul>
10 - 10.5 HOURS	<ul style="list-style-type: none"> <li>2 X UNPAID BREAKS</li> <li>2 X 30 MIN UNPAID MEAL BREAKS</li> </ul>	<ul style="list-style-type: none"> <li>1 PAID BREAK</li> <li>2 X 30 MIN UNPAID MEAL BREAKS</li> </ul>
10.5 HOURS PLUS	<ul style="list-style-type: none"> <li>3 X UNPAID BREAK</li> <li>2 X 30 MIN UNPAID MEAL BREAK</li> </ul>	<ul style="list-style-type: none"> <li>2 X PAID BREAK</li> <li>2 X 30 MIN UNPAID MEAL BREAK</li> </ul>

## Annex E

### FlexiBreaks

FlexiBreaks enables advisors to move their breaks (including meal breaks) on the day of their shift to suit their needs. BT will operate FlexiBreaks wherever possible and subject to customer demand.

GUIDING PRINCIPLES	
1	Standard break packages apply, and these are dependent upon an advisor's employment contract.
2	FlexiBreaks can apply to both paid and unpaid breaks, during normal, Flexi & overtime hours.
3	All requests to alter the timing of breaks must be done on the day in question and must be in advance of +1 minute. On the minute or retrospective changes cannot be requested.
4	Requests can be made to alter the timing and not the duration of breaks only ( <i>however two separate breaks can be moved together to lengthen duration</i> ).
5	The outcome of any request is dependent upon coverage tolerances and the priority level of schedule exception codes and are final once approved / denied in IEX.
6	Multiple requests to alter the timing of breaks are allowed.
7	Existing break rules must be adhered to when requesting any amendments to the timings of breaks.
8	Breaks must not be moved to the beginning or end of shift.
9	Comfort breaks can be taken as normal when operating FlexiBreaks.
10	Advisors do not have to alter the timings of their breaks. FlexiBreaks is a complimentary initiative only to empower advisors should they wish to take advantage
11	Team Leaders will have a real time holistic view of advisor schedules to monitor usage and wellbeing and ensuring the 2hr 45min policy continues to be adhered to. This will also be reviewed in the monthly resourcing reviews with the National CWU team.

## Annex F

### FlexiTime

"Work FlexiTime IN when **OUR CUSTOMERS** need you and take FlexiTime OUT when **YOU** want it"

FlexiTime allows advisors to work additional hours when the business needs them, those hours are banked and can be taken back when an advisor chooses. A balance of up to 1 week of standard contracted hours can be worked up. FlexiTime gives advisors greater control over their working patterns and work-life balance.

In addition, advisors can go into negative flexi debit which is known as reverse FlexiTime

### Guiding Principles

BOOKING FLEXITIME	
1	FlexiTime out can be booked at any time subject to point 7 below, though on smaller teams there will be a need to ensure that cover is maintained.  All FlexiTime In / FlexiTime Out requests must be booked via IEX.
2	The status of any FlexiTime In / FlexiTime Out pledges is only final once approved / denied in IEX.  Once FlexiTime Out has been confirmed it cannot be cancelled by BT.
3	FlexiTime In will be worked supporting your usual function.
4	FlexiTime In can only be worked during normal operating hours
5	You can accrue a maximum FlexiTime balance equivalent to your weekly contracted hours.
6	Reverse FlexiTime is limited to a maximum of 15 hours, to be worked back in a 3-month timeframe.
7	During peak times throughout the year, including any 'special events' FlexiTime Out may not be available. Clear and timely communication will be made to advise of these periods in advance. CWU will be informed in advance of any such events.
8	FlexiTime is accrued and taken minute for minute. The minimum FlexiTime slot will be 15 minutes.
TIMELINES	
9	On the day FlexiTime In / FlexiTime Out will be available unless expressly communicated otherwise.
10	All pledges must be requested within 30 minutes of start time (or by 3.30pm for any pledges between 4pm-11pm).
11	Any confirmed FlexiTime In pledges can be cancelled with 24 hours notice. Any unexplained cancellations within 24 hours will be uploaded as 'No Show'. More than 3 'No Show's' over a 6-month period will be addressed by line manager and may result in a 4 week ban of FlexiTime usage.
12	Any queries to the FlexiTime Admin Inbox will be responded to on the same day, except in instances where queries are received out of hours. These queries will be handled the next working day.
13	Advisor balances will be reflective of any FlexiTime In / FlexiTime Out pledges on the following day after the scheduled event.

<b>WORKING TIME DIRECTIVE</b>	
<b>14</b>	The standard BT Working Time Directive policy applies when working additional FlexiTime hours.
<b>15</b>	If you're under 18 you can't work for more than eight hours a day or 40 hours per week and you can't work between 10pm and 6am. These limits can't be averaged out, for example you can't work nine hours one day and seven the next.
<b>BREAKS</b>	
<b>16</b>	If you extend your standard attendance by requesting to work more FlexiTime In – you may have to take a break if you will breach the 2 hours 45 minutes maximum sit time. See annex D for more details.
<b>BEST PRACTICE</b>	
<b>17</b>	You are responsible for ensuring the correct exception codes are uploaded on to your schedule - otherwise this may impact your FlexiTime balance. In the event of any anomalies please speak to your Team Leader.
<b>18</b>	FlexiTime Administrators will proactively send your current FlexiTime balance to your Team Leader bi-weekly. If you need it before this time, you can email the FlexiTime Inbox.
<b>19</b>	Your Team Leader will have a holistic view of your schedule, but out of courtesy, we do ask you to make them aware of any short notice leave.
<b>20</b>	The operation of FlexiTime does not change the options available for Special Leave in line with BT policy.
<b>LEAVING BT</b>	
<b>21</b>	In the event that you leave the company then you will normally be required to use any accrued FlexiTime during your notice period. Exceptionally, this will be paid back as salary as part of your final monthly pay.
<b>22</b>	In the event that you leave the company owing time as a result of Reverse FlexiTime, then you will normally be required to make up the deficit during your notice period. Exceptionally, this owed time will be deducted from your final monthly pay.

## **Annex G**

### **Initial Attendance Patterns**

Annex G is contained in separate documentation.

## Annex H

### Preference and Allocation Matrix

