

INFORMATION FOR MEMBERS OF



# LANCS & CUMBRIA BRANCH

**WHO WORK FOR BT**

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[www.lancscumbria.co.uk](http://www.lancscumbria.co.uk)

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# INTRODUCTION

We recently received the following letter from a member, as I started to gather the information to answer the points raised, it became apparent to me that we should try and convey all the information to as many people as possible. This then led me to look at other issues which tend to be problematic across the board and which affect all our members one way or another, who work for BT.

The result being this collection of CWU advice, copies of agreements and even BT policy.

The issues raised and covered, within this document, cover all aspects of our BT membership it is not meant to reflect solely upon one single line of business, as this is not the case; sadly members within all lines of business within BT have raised these issues during the last 12 months, although the letter clearly refers to Openreach, this response covers all lines of business.

If anyone is feeling that they are under too much pressure or are struggling to cope in any way, then please ring us or call the employee assistance number on 0800 9176767.

This is meant to be read as and when, should the need arise. We hope this is at least interesting if not helpful.

Many thanks

Heather Park  
Branch Secretary

Hi Heather,

Would it be possible to send out a note to all CWU members with the following two points?

1. Lunch hours are mandatory in the working day and should be spent having a lunch break. Working through lunch to get a clear, writing down your next job or looking at work emails is work: work which you don't get paid for. If you were unfortunate to have an accident, I am certain Openreach could blame your "working lunch," as a reason for your accident and then proceed down the disciplinary route....

2. People should only be touching electronic work devices to sign on at 08:00 and not before. Again it's free labour you're giving this multi million pound profit making company.

I recently got told of a fellow colleague, who is a 08:00 starter sending their first job back at 07:57.what is that all about

These behaviours can only be due to the way Openreach has treated its workers. People are afraid of low performance and it's possible consequence....i.e. compromised agreements, pips dabs, whatever. Why else Heather would engineers, as mentioned above, behave like this. The amount of people I see running round daily is frightening, and what they do not realise is, that they are helping to make it worse for themselves and others.

Openreach management deserve full credit for what they have achieved and must be laughing as they have people jumping through hoops.

Please send out this information and stop the rot Thanks

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## Rest Periods

### BT and European work time directive

Copied from BT intranet January 2014

The regulations provide entitlement for all adult employees to a daily rest period of 11 consecutive hours in each 24-hour period.

Every employee is also entitled to an uninterrupted break of 20 minutes when daily working time is more than 6 hours. BT's break allowances are more generous than this. The break should not be taken either at the start or the end of the working day. A lunch break would not normally be counted as working time however if an employee is obliged to participate in a working lunch as part of their work, then it would be classed as working time.



An employer cannot require an individual to work during the time that should be part of a minimum rest period except in the case of those who have agreed to be on-call. It is BT's policy that the minimum rest period and rest break should be taken. In some circumstances it may be appropriate to schedule break times to ensure adherence to the spirit of the regulations.

As rest periods and rest breaks are entitlements, it would not be unlawful if an employee chooses to work at a time that meant foregoing his/her rest period or rest break (e.g. an MPG who works through their lunch break). However, as a manager you should be discouraging such activity.

Managers should avoid the use of pagers and phones to contact employees during their rest break unless operationally essential.

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## **CWU START & END OF DAY**

from Ian Cuthbert CWU Date: 13 October 2009:- Ltb 896/2009

“.....One such is the vexed question of when someone actually starts work. It is relatively clear for Home Parkers but in recent weeks the issue of whether Yard Parkers commence work by logging on PRIOR to their official start time has arisen.

The CWU has consistently taken the line that there is no obligation for people to do any work prior to their start time. Some managers have claimed the opposite.

The issue has been pursued with Openreach nationally and has been resolved. I attach, for your information, a copy of a briefing which is being sent to all managers headed 'Re-enforcing Code of Practice and the Correct Behaviours'.

In the section headed 'Day 1', I draw your attention to the fourth paragraph. This reinforces the fact that team members commence log-in at their start time. At the start of the day, Yard Parkers need time to log-on and undertake daily vehicle checks as well as pick up stores/equipment as necessary.

**Hopefully this will clarify the matter.**

**One of the specific questions asked is around yard parkers who take more than 15 minutes at the start of the day before they move. There is not a defined time for yard parkers to move from the yard. At the start of day, yard parkers need time to log on and undertake their daily vehicle checks as well as pick up any stores/equipment if necessary. However, team members will commence log-in at their start time, but reasonable consideration should be given to occasional late sign-ons of a few minutes duration, to allow for system difficulties, etc.**

**The time to do this will vary dependant on local conditions and access, which is why there is not a defined time. The First Customer Commitment in Jeopardy alert for BT site parkers needs to have a time dwell, after the scheduled start time, to operate and allow for the above activities. This is currently set at 20 minutes. This means that an alert will be generated if the vehicle has not moved after 20 minutes from the scheduled start time. With the focus on trended information and the impact on overall productivity, if there are occasions when an engineer doesn't leave the yard within 20mins and it's not a regular occurrence, the engineer should understand the impact on their effective results as a whole and managers should not focus on a few minutes ineffective time at start of day in isolation. The time taken before a Yard Parker moves at the start of day has caused some confusion, future training material will be updated to provide this clarity.**

### **LANCS & CUMBRIA ADVICE**

**It is the understanding of the Officers of the Lancs & Cumbria Branch, that office workers should also be in the act of signing on at their start times, they are not required to be 'signed on' likewise at the end of the day you are not required to work over your finish time, to sign off.**

# Meal Breaks

Dear Mr Cuthbert

18 October 2010

## Meal Breaks

I am writing in response to your letter, dated 19 August, having consulted with Openreach operational colleagues. I can confirm that those engineers who choose to travel to a BT building for their Meal Break will be allowed up to 10 minutes travel time direct to their nearest BT building and up to 10 minutes travel time from that BT building direct to their current or next job location. This will provide the vast majority of engineers, who wish to travel to their nearest BT building for their Meal Break, the opportunity to have a 40 minute meal break in a BT Building as well as access to toilet and washing facilities during their meal break.



In the majority of cases the nearest BT Building will be less than 10 minutes away. In virtually all cases, the nearest BT Building will be within the ellipse as it will be the serving exchange for the job the engineer is working on. In the few situations where this is not the case, prior agreement with the local manager will need to be sought and Controls informed. In all situations the engineers will be expected to book on lunch immediately they arrive at their nearest BT Building. In exceptional circumstances, e.g. in rural or remote areas, an engineer wishing to travel to their nearest BT Building may be more than 10 minutes travel time from it. In these exceptional circumstances, prior agreement with their local manager will need to be sought and flexible and pragmatic solutions found which will be taken into account when reviewing individual productivity.

I trust that my response will enable you to accept the above proposal and we can then synchronise communication of the implementation of this proposal.

I look forward to your response. Yours sincerely Alan Towers Openreach Employee Relations

## Health and Safety before and after your start time

**We have raised some safety issues with our people at CWU HQ, that we thought may be useful regarding when you are and are not insured : for clarity this is their response and has just been checked with CWU Legal Dept:-**

*Individuals, are insured whenever on BT premises. This has to be in place to cover members of the public.*

*However with ref to if you are insured as an employee outside your scheduled hours/including overtime. For the purposes industrial accidents claim, you are only covered if the accident happens during you scheduled/overtime hours.*

*This comes up mostly as an issue with our members in Openreach who drive a BT vehicle and give the company time before start of day and end of day due to the parking at home agreement. (Un agreed with CWU agreement).*

*The actual document itself outlines the process for such an eventuality.*

*Whether someone is cover for and industrial injury is looked at on an individual basis.*

*Point 2 you ask about ie. Unlocking the gate:-. Years ago when all buildings were permanently occupied, they used to have an individual whose job it was to unlock the gates. That individual was paid overtime. Probably find any documentation for that in the old EI's. Kept mainly in the old branch secretaries handbook. Normally kept in large brown leather folders.*

*Nowadays the first person on site of an exchange building would just open the gates to enter in works time. However if you are asking in respect of someone who parks there, and is entering prior to their start time, and they have an accident, then the same would apply as before. Each case would be assessed on an individual basis. They would automatically be insured for any injury as previously mentioned they are on BT premises and always covered, it's the industrial injury bit that causes he problem. Because this could involve loss of compensation for long term injuries.*

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## ACCIDENTS/INCIDENTS IN WORK

Members who have an accident at work are invited to report their accident or incident, direct to the branch office, 01772 200222, however BT do supply us with copies of any reports that they have received from members within our area. All accidents/incidents (even if you think it's a 'near miss'), during work or on a BT site must be reported to the BT incident helpline. You must aim to ring the helpline within 24hrs of your accident, unless circumstances forbid this from happening: BT incident line 0800 671 345

Members, and their dependants, who have been injured as a result of an accident outside of work, may also be able to make a FREE claim for compensation through the CWU Unionline

### TO REGISTER A CLAIM :

- Call Unionline on freephone 0300 333 0303
- Visit [www.unionline.co.uk](http://www.unionline.co.uk) (complete claim form on line)

### Note:

**The freephone number for Unionline on 0300 333 0303 can also be used to obtain legal advice on other non work related issues. Additionally, members will also be able to get advice on employment law procedures, however, this will not include assessing the merits of any claim.**

It has come to our attention that many RTA's at work are reported to the insurers of BT vehicles on 0800 731 7341 , but are not reported to the Accident and Incident Reporting Group who monitor accidents at work and inform us of accidents involving our members. Members are reminded that RTA's should be reported to both groups. A reminder of the accident reporting number : - 0800 671 345.

**The Union Legal Services are free and members will not incur any costs at all relating to their claim.**

We would also like to remind members that if they sustain an injury, whilst at work, they should report this to the department of work and pensions; you should ask for a BL100A form. It is only this department that can legally decide if this is an industrial accident. There are two reasons we encourage this a) should you take any sick leave we can challenge that it be negated due to the injury being sustained whilst in work. And b) should you suffer with this injury later in life and make a disability claim etc you will have documented proof of when and how the injury was sustained.

# BT – Targets & Performance

We should never forget that the way we are performance managed is a BT policy: that on paper it looks like a fair system that was agreed in good faith.

What we see in reality is a set of targets cascaded down layer, by layer through the management structure until ultimately they fall at our feet and we are expected to not only reach but surpass these targets. We have argued that our members work on a binary system: a 1 means job complete and a 0 means incomplete; so when managers and senior number crunchers raise the bar by a 'mere 0.4%' or so, it's a whole job that has to be completed somewhere by one of our members, we cannot do 0.4% of a job, it would be classed as incomplete.

Setting targets for managers is, we think, the root to all evil. This leads to team league tables and of course pressure on managers to succeed which ultimately means pressure on our members.

What can you do about targets: the CWU line is 'we never agree targets' which is true, however this does not help our Branch members; as everyone is measured and judged by one or other set, and failing to hit them means performance issues, a plan and possibly dismissal, that's coupled with the stress and humiliation which is often felt when going through the process.

Never formally agree targets, the only thing you will promise and can ever promise, is that on any day you will work to your best ability for that day, in line with BT's policies and processes. As you know, each day is different.

That is all we would expect to see you have promised, not to hit 75% or 90%, regardless of anything a manager may threaten you with or say, you simply promise to work to the best of your ability on the day, in line with BT's policies and processes. It does not matter where you work, or what you do, this is the only commitment you can give: anything outside of this will depend on a third party, the job you are given, the weather, customers, surroundings, health, etc.



If you are set a plan with a target, let's face it, who isn't? Then make sure your manager notes that you do not promise to hit the target, if you feel under pressure to give a response, (because your manager may be under pressure to note one), then simply state, that regarding the target they set, you 'will endeavour to meet it by working to the best of your ability on the day.' The new performance dashboards, we are told, ensure that the 'basket of measures' is

considered in a far fairer way than ever before: time will tell, and in seriousness we really hope it does for our entire members' sake.

We recently wrote to Colin O'Callaghan regarding an update on performance management issues and the talks that senior CWU are having with BT. Below is his response, our Branch health and safety officer will feed back to us all anything that comes from the occupational report.

*The national team are continuing to meet on a regular basis, we are pursuing some further guidance on the use of Settlement agreements in sick absence cases. There have been escalations under the new escalation procedures and the Company are dealing with the issues we are raising. Inevitably most of the escalations are coming from Prospect as they are the first to see any inappropriate behaviours. We have raised the inappropriate use of Settlement agreements in BT MSL and Brian Healy has got that rectified. The National Team has met with Dr Nita Clarke on two occasions as part of her Independent Review. We are currently awaiting the outcomes of that review. The company is just about to embark upon its second Organisational Health survey and the Executive has been invited to attend the Leadership Training that it is rolling out to the top 600 managers on the new approach to Organisational Health approach.*

*Colin O'Callaghan*

Should you be called in to review your figures, if you are told you are below target, our advice to members is to make sure your manager has done a thorough 'Root Cause Analysis' and that what is levelled at you as a failing, is indeed something you can alter and improve upon; something that your manager can pin point as being more or less, your fault. If this is not done, if this cannot be proven then no matter how good a coaching plan may be, you will not be able to improve your figures.

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## FACT FINDING INTERVIEWS

The first step of the discipline process, do not be deceived that it is anything other than this. It may often feel like a fishing trip: your manager may call you in for a meeting, at the point you sit down they will no doubt utter these words, “I have called you in to do a fact finding interview, with regards to an allegation made against you.....”

You will now be thrown into a mixture of panic, confusion, you may feel annoyed: no doubt at this point you will not be thinking straight. Sadly representation is not permitted at a fact finding, unless there are exceptional circumstances: if there are exceptional circumstances state them clearly to your manager. Likewise if there are two managers present at the fact finding, there should only be one: our members have told us that they find this very intimidating, quite often they say it feels like an ambush.

This fact finding meeting is to establish the facts, before any decision is made regarding further discipline action. The decision will be made solely by the manager who has called you in, not HR, not their senior manager or any of their peers.

It is important that the manager establishes the facts that support what the individual is saying, and not just the facts that support the allegation. Only give the facts, if asked for an opinion then politely decline: sadly we have found that opinions can often be used to implicate.

If at any time during this, or any other meeting for that matter, you feel like you need a break: to maybe clear your head, get your emotions back in check, for the toilet, a drink, to ring us; then you are entitled to ask for a break of a few minutes and this should be unquestionably granted.

**At the end of the meeting make sure the facts have been established and recorded, you can ask the manager to read them back but usually they will get you to read them and sign to say it is an accurate account of the meeting: if you have a problem with anything ask the manager to note your concerns.**



**All that is required of our members is that you are truthful and honest at these meetings, by answering concisely; you do not need to elaborate.**

**Once you have agreed the facts have been captured to your satisfaction, leave the meeting. Then ring us!**

**One last thing, this process cannot start at all if you are off sick, you cannot be forced back into work to meet for a fact finding interview. However, if you go off sick after the fact finding interview, then the discipline process can proceed without you being there, up to and including dismissal if the case warrants it.**

## **FAQs BT discipline procedure**

### **BT intranet - Frequently asked questions**

#### **Q. Can I bring a non BT person to accompany me to a Discipline hearing?**

A. You are allowed to be accompanied by either another BT worker, or an accredited representative from a trade union. You may however seek advice from an outside person.

#### **Q. If I feel I have been unfairly treated by the Discipline Procedure what is my right of appeal?**

A. You may use the appeal process which is outlined within the procedure.

#### **Q. What happens in cases involving officials of recognised unions?**

A. The case would be discussed with the Union Headquarters or other Union representative depending on the status of the individual concerned. Should the issue relate to the representative in their Union capacity managers should refer to the National Agreement on Facilities for Recognised Unions at <http://tradeunioncontacts.intra.bt.com/TradeUnions/FacilitiesProvidingPolicy/index.htm>

#### **Q. Are line managers allowed to search an individual's property as part of the investigation?**

A. Managers can search BT property eg van, computer, desk in the course of the investigation. However managers must obtain the permission of individuals to search any private property stored on BT premises or before searching any BT property which is provided for an individual's private use, eg a locker. Should such items require searching the owner or a representative of the owner should be present.

#### **Q. What mitigating circumstances should be considered by the line manager?**

A. Account should be taken of the individual's current conduct record, health and welfare. It may also be relevant to review the individuals general record, position and length of service.

#### **Q. What happens when someone is absent from work when the disciplinary issue is raised?**

A. The individual must normally return to work before disciplinary action can commence. However if the absence occurs after the fact finding interview consideration should be given to the seriousness of the offence and the health of the individual. (An OHS view may be sought). At any stage, the disciplinary action will be progressed with the consent of the individual and/or OHS, either by the individual supplying a written submission or by attending a hearing.

#### **Q. What happens if the individual is due to leave the company?**

A. The case should still be brought. Any proven disciplinary matter could affect the terms on which they leave the company and any state benefits entitlement. Newstart/VR leavers commit to maintaining satisfactory standards of performance, attendance and conduct during the period between the signing of the agreement and their last day of service. Failure to do so could result in BT rescinding the agreement. Also BT reserves the right to rescind the agreement in respect of misconduct prior to the date of this agreement but first brought to BT's attention between the signing of the agreement and the individual's last day of employment.

#### **Q. Should an investigating manager accept an anonymous witness statement?**

A. Anonymous witness statements are rarely used. In some cases individuals may have justified reasons for retaining anonymity from the accused. However the identity of the individual will be known to BT and their accusations will have been verified by further investigation.

#### **Q. When might BT Security be involved?**

A. BT Security may highlight a infringement of BT's policy following an investigation. Line managers can request BT Security assistance if they believe there has been a infringement of BT's policy but require further evidence.

**Q. What happens if after an initial warning, either informal or formal, an individual repeats the same misconduct?**

A. The individual should have been advised that any repeat of the misconduct will lead to further disciplinary action. They will be invited to attend a disciplinary hearing to explain their actions.

**Q. Does the investigating manager need to retain a copy of all the case papers?**

A. No. All papers should be returned to the HR Case Management Service Centre (CMSC) Team.

**Q. What is the definition of serious?**

A. Serious misconduct is misconduct which is likely to need more than an Informal or Oral Warning applied as a corrective measure. This applies to any single serious breach of conduct rules and to minor misconduct which has arisen in spite of previous disciplinary action (e.g. Informal Warning(s) followed by Oral Warning(s)).

**Q. Are witnesses normally called to attend a disciplinary or appeal hearing?**

A. There is provision within the accepted code of practice for witnesses to attend disciplinary and appeal hearings. Attendance of witnesses however does not happen as a matter of course at all disciplinary hearings but may take place where it is believed the witness could provide vital additional evidence. It should be noted however that although a witness can be called to attend a hearing they cannot be mandated to do so. Accordingly if a witness declines the offer, the parties are obliged to accept their response. In cases where a witness is asked to attend a hearing they may be questioned by either side. The investigating manager must however make every effort to protect witnesses from any form of intimidation either to attend a hearing or as a result of their statement and any request made to the investigating manager that a witness should attend will be considered on a case by case basis.

**Q. What happens to any annual leave I have owing if I am dismissed?**

A. If you are dismissed with notice, you would normally be expected to take any outstanding annual leave within the notice period. If you are dismissed without notice, arrangements should be made for any outstanding annual leave to be paid back. See [https://intra.bt.com/bt/hr/joining\\_leaving\\_bt/leaving\\_bt/miscellaneous/Pages/index.aspx](https://intra.bt.com/bt/hr/joining_leaving_bt/leaving_bt/miscellaneous/Pages/index.aspx) for more Details



# Managing Changing Capabilities

If you develop an injury, if you take ill etc, this BT policy –MCC- covers for that eventuality. If you are no longer capable of carrying out all of your current duties to a physical or mental restriction, BT may look to implement this MCC policy. It has two parts A and B, A being short term changes needed B is more serious as it covers permanent changes and can ultimately result in a person losing their job.

We liken the MCC process to the ripple effect caused by a stone in a pond. The centre being you on full duties, the next is you in your current duty but with an adjustment; this adjustment allows you to remain in the workplace and environment you are used to being in. Then if that is not possible your manager should look at alternative roles within his team, or roles that you can carry out aspects of. Failing this the same process is applied at your senior manager's level. Ultimately if no job can be found then a job search will commence spanning the whole of BT, the last resort being to look and see if a third party is carrying out a duty you can do and replace them with you.

If none of the above can be achieved then you can be released from your contract of employment. It is important that you contact the Branch officers if you are put on an MCC. While going through the process you should be afforded the opportunity to job shadow, practice interview techniques and even retrain. Project work must be considered as an option.



Once your manager opens an MCC case on the BT systems, then a case advisor will be appointed to oversee that BT policy is being followed, and to make you aware of all job opportunities before they are advertised on the job news.

Jobs of the same grade or below, if within your capabilities to do, then you should be offered these automatically. If it is a promotion, again as long as you are capable, then you should clear the paper sift automatically and be invited along for an interview.

Below has been lifted off the BT intranet.

## Overview and Principles

BT intranet February 2014

BT's Managing Changing Capabilities policy outlines the practical steps we will take to retain people who develop a disability or long term health condition, or whose existing condition worsens, while working at BT. **In all cases, the key objective is to enable the individual to resume, or continue in, productive employment within their existing team, unit or Line of Business.**

We are committed to ensuring our working culture is fair and inclusive enabling all employees to make their distinctive contributions to the benefit of the business. We are committed to the employment and retention of disabled people in BT. We expect our managers to exercise leadership in this field by discouraging prejudice and by role modelling appropriate behavior. By demonstrating - through our actions and words - our

commitment to fairness and equality for all our people, we will create a supportive culture where BT people will feel comfortable to discuss their needs with us openly. Capability changes might be temporary, permanent or progressive. They might happen to any of us, at any time. We invest a great deal in our employees, and we must try everything practicable to retain their skills and abilities, even if their capability changes. This is not only required by law, but it is right for our business. Line managers must take all reasonable steps to retain people who develop a health condition or disability during the course of their employment with BT.

BT's MCC process has two distinct elements;

- Part A - making adjustments to their current role
- Part B - searching for a new job if adjustments cannot be accommodated.

Our focus should be on doing everything reasonable to keep the individual in their current job. BT MCC people will only move to the Job Search process once all reasonable adjustments have been made/considered and it proves impossible for BT to accommodate these.

The Equality Act (2010) places a legal requirement on BT to make 'reasonable adjustments' to accommodate disabled people at work, where necessary. Through regular open discussions, we will understand what adjustments are required to ensure everyone can be as productive at work as possible. We will accommodate these adjustments, as a matter of course. Managers can make simple local adjustments themselves.

Sometimes, we are not sure what types of adjustments will help, or how to implement them. BT's Enable service will provide access to external expertise from disability experts Remploy. Remploy will help us understand what barriers might be in place, and how to remove them to allow BT people to be as productive as possible. Remploy can also help access any government funding that might be available towards the cost of making these adjustments.

In a limited number of occasions, despite seeking and implementing expert advice through Enable, it will be impossible to accommodate adjustments required to retain an individual in their current role. In this situation we will conduct a job search and make every effort to find alternative work so that the individual can stay with BT. Line managers wishing to progress to job search will need to complete a business case proving that it is impossible to retain people in their current role. This must be approved by the Line of Business MCC Policy lead before formal job search can commence. When filling vacancies, MCC people have priority above that of all other BT people, including our redeployees.

# BT Passports

BT intranet 2014

## Carer's, Disability & Wellbeing

BT intranet February 2014



A BT Passport is a simple word document which can be completed by any BT employee who feels their circumstances could have an impact on their ability to work either currently or at some point in the future. It helps individuals and their line manager record their agreements on how a happy compromise between business and individual needs will be met. BT and our Trade Unions worked together to create the BT Passports.

Completing a BT passport is voluntary on the part of the individual and there is no record of who has or has not completed a passport. The passport can be downloaded from the intranet and completed at a 1-1 between the employee and their line manager. Its completion is aimed to provoke discussion about balancing business and individual needs and to record the outcome of that discussion. After completion, the passport can be reviewed quarterly or more frequently if preferred, at the discretion of the individual and manager. Once completed the passport is confidential, but if the individual's line management changes, the passport should be handed over to the new line manager, whilst maintaining confidentiality. This removes the need to repeat personal information and renegotiate local agreements already reached between the line manager and the individual.

A BT employee who has used a passport says **"If you had to move jobs then your new manager would be able to find out all about you without going through all the gory details"**.

There are currently 3 BT passports in the scheme:

### **BT Disability Passport**

The BT Disability Passport can be completed by any BT employee who has a disability or long term health condition they believe could have an impact on their ability to work, either currently or at some point in the future.

The BT Disability Passport describes, amongst other things:

- The individual's health condition or disability and its impact
- Any medication, and any issues that might arise as a result of taking this medication
- Any reasonable adjustments the individual might need
- Action to take if the individual becomes unwell at work
- Agreed communication between the individual and BT if the individual is unable to come to work

The passport might also include details of recommendations made by external parties, for example Access to Work or AbilityNet via an Enable referral.

### **BT Carers Passport**

The BT Carer's Passport can be completed by any BT employee who has caring responsibilities they believe could have an impact on their ability to work currently or at some point in the future. The purpose of the BT Carer's Passport, amongst other things, is to capture

- the nature of the caring responsibilities now
- their likely shape in the future

- the adjustments and flexibility that the individual needs
- the action to take if the individual needs to leave work suddenly.
- the agreed communication between the individual and BT if the individual is unable to come to work.

***BT Health and Wellbeing Passport***

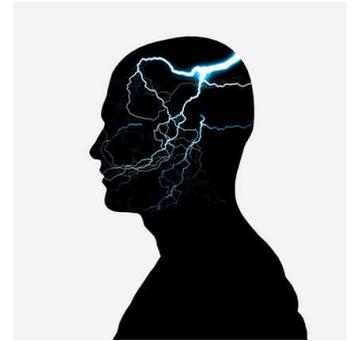
This was the original passport in the scheme, developed by a CWU member who had personal experience of mental ill-health, and wished to record her contact strategy for days on which she was not able to come in to the office. The focus, as with all the BT Passports, is on removing any barriers which might prevent the individual from making a full contribution at work. The plan is agreed while they are at work and in a good state of health so it can be implemented quickly if and when they become unwell.

The purpose of the BT Health and Wellbeing Passport is:

- To describe the potential impact of an individual's condition on their ability to do their job effectively.
- To detail reasonable adjustments, either temporary or permanent, which allow the individual to carry on doing their job.
- To provide a list of resources that can be called upon to support them and their manager in helping them to continue working.
- To outline the action their manager and/or colleagues might consider if they become unwell at work.
- To define the best means of communicating with them if they are unable to come to work.



# MENTAL HEALTH



Far too often we meet members who are quite visibly showing signs of stress, anxiety and/or depression. They quite often, show unusual characteristics, and this can lead to poor judgment ultimately landing them in a situation that can result in a discipline hearing.

Although BT has many policies, guidance and documents on the subject, and all managers are supposed to be trained to spot the signs; these can go unmissed by those around you who do not either notice or wish not to deal with it. Anyone who is feeling the slightest bit down, anxious, having panic attacks etc, can follow the following tips:-

**Ring the branch**

**Tell your manager**

**Take the online stream test**

**Visit your GP**

**Ring the BT helpline on 0800 9176767**

**Ring the CWU harassment helpline 0800 107 1909 or email [cwudignityandrespect@firstassist.com](mailto:cwudignityandrespect@firstassist.com)**

We would ask all our members to try and speak out if they are suffering, we would also ask our members to speak out if you suspect someone is suffering and struggling. Too many times we see cases come back to us, stating the company were 'unaware'. Tell someone and then allow some time for them to act, employers may cause stress, but it is not always enough to act on, but neglecting to deal with it is a completely different thing.

We need to keep an eye on each other, to look after your colleagues and to keep them out of a possible discipline situation.

To access the system, type stream in to the search engine on the BT intranet, take the test.

## **STREAM**

BT intranet 2014

### STREAM

STREAM is intended for use by BT people who feel that they are subject to stress or who have suffered a period of stress related sickness absence. This may be identified through a number of ways including

- A member of your team raising the issue themselves, by stating that they feel under stress and may not be able to cope
- You or an OHS adviser suspect that a member of your team is showing symptoms of stress

STREAM is free and available on the BT intranet to anyone included on the HR database Peoplesoft.

### STREAM objectives

- To provide an objective assessment of an individual's personal levels of stress
- To identify broadly the stressors in an individual's life
- To provide an overall rating of an individual's stress levels
- To provide recommendations for the individual and his/her line manager to use to manage and reduce the individual's stress levels

### STREAM ratings

The STREAM report will include a stress rating for the individual. The ratings are:

RED – this indicates the individual is under potentially high levels of stress and action should be taken quickly to address and manage their issues.

AMBER – this indicates the individual is under some degree of stress or is at risk of becoming under stress in the near future. These issues are still important and should be addressed at a convenient time in the near future (for example the next scheduled 1:1 if it occurs within the coming month).

GREEN – this indicates the individual is not under stress at the moment. This does not mean that they are necessarily capable of taking on more work. Instead it could indicate that they are managing with the work and domestic demands and pressures being placed upon them at the moment

### The selected line manager

The STREAM tool allows the individual to select their first or second line manager to receive and manage their STREAM report.

It is the responsibility of the selected line manager to receive and deal with the individual's STREAM report.

Here is an example of the information available on the BT intranet, there are a lot of documents on the intranet for our members please take a look. These are to help our members and their managers identify issues and give direction on how to deal with them:-

## **BT Mental**

### **Health Toolkit**

#### **Resources to help promote good mental health and wellbeing**

Management competencies for stress: Behavioural competencies for people managers to prevent/reduce stress at work. Positive mentality and How good is your mental health: Everyone can do something to boost their own mental health and wellbeing. These programmes aim to get

you thinking about your mental health, and explain what you can do to build positive changes into your life.

**Managing pressure:** Helpful information to understand, manage and cope more effectively with stressful situations.

**Achieving the balance:** Advice about how to achieve a good work/life balance including:

- flexible working
- career/life planning
- childcare
- carers

Resources to help with early identification and management

**STREAM:** The Stress Assessment and Management tool gives a way of recognising work pressures that people are not coping with. And it recommends measures that individuals and their manager can put in place.

**STRIDE:** A training course to help people managers in the actions they should take to deal with stress in their teams.

**Two minute guides to stress:** Advice about how to recognise stress early to improve mental wellbeing and help people to stay in work.

**Employee Assistance Management (EAM):** External consultants who support BT managers looking for guidance with particular issues involving an individual or team of people. This free support service is available on an ad hoc, day to day, basis.

**Health and wellbeing passport:** Available to complete if individuals feel their circumstances could have an impact on being able to work either now or at some point in the future.

**Training:** Various courses are available about managing stress. One in four people will experience some kind of mental illness.

Resources to help manage any mental health issues:-

**A guide to mental wellbeing at BT:** Open Minds: Head First booklet supports individuals and people managers if they experience mental ill health and encourages good mental health.

**Resource pack for managing people in distress:** A summary of the key issues for people managers to be aware of when dealing with people in distress. It also gives a list of the main BT resources and support services available.

**Managing mental health:** A one day workshop covering the help available for someone experiencing a mental health problem before they get professional help. It doesn't teach people to be therapists but it does teach people how to recognise the symptoms of mental health problems, how to provide initial help and how to guide a person towards appropriate professional help.

**Self-help books:** A list of recommended self-help books that cover psychological/ mild mental health problems such as anger management, addiction, depression and compulsions. Most of the books employ a Cognitive Behavioural Therapy (CBT) approach, providing step-by-step self-help treatment

programmes which encourage readers to think about the way their thoughts, feelings and behaviour interact and affect their wellbeing. Employee Assistance Programme (EAP): A range of personal and group services, which can help people, deal with worrying or difficult situations. Confidential, free service, available 24 hours a day, 7 days a week, 365 days a year. Includes personal counselling and advice lines (legal, financial, consumer issues, state benefits/social services).

Employee Assistance Management (EAM): External consultants who support BT managers looking for guidance with particular issues involving an individual or team of people. This free support service is available on an ad hoc, day to day, basis.

Mental health service: A service for BT people in the UK with common mental health problems such as anxiety and depression. BT people can be referred to the service by their manager.

Occupational Health (OH) Service: Specialist OH Clinicians are available to provide advice about managing and preventing work related health problems. Confidential advice is available about all work related health matters via the OHS referral process. Details are on the health and wellbeing web site. Managers can also ask for general OH advice via one of BT's Senior Nursing Advisors by e-mailing [core.referrals@bt.com](mailto:core.referrals@bt.com) requesting a call.



# ANNUAL LEAVE

BT INTRANET 2014

## Scope.

All employees in the UK. This covers paid annual leave entitlement. Unpaid and special additional leave are covered under "Special Leave".

## Roles and responsibilities.

Annual leave is recorded locally. Leave entitlement and leave taken is authorised by your manager in accordance with local operational requirements and constraints. Leave at any specific time cannot be claimed as a right and cannot be taken without prior permission.

It is not always possible to allow the full holiday allowances in the summer holiday season (which is the 22 week period commencing with the first full week in May). In these circumstances, the proportion allowed in the summer leave period is 20 days. These restrictions may be lifted at local management discretion.

Annual leave must be taken in the leave year in which it falls. There is no statutory or contractual entitlement to carry-over unused leave from one year to the next but you can normally carry over up to 5 days at the discretion of your manager. Exceptionally your manager may allow you to carry-over more where for example it is as result of leave being refused or cancelled due to urgent unforeseen operational difficulties and it has not been possible to re-schedule it within the leave year. Managers are expected to take all reasonable steps to ensure that these circumstances do not arise.

Managers should consider buying out accrued annual leave only as a last resort, where allowing you to take it or carry it over would cause unacceptable disruption to service.

## Process. Overview.

Leave entitlement is dependent on your grade and length of service. It is calculated for a period 1st April to 31st March each year.

## Detail.

Holiday entitlement for TM grades is as follows:

Length of Service	Holidays	Notes
On entry	25 days	
5 years	26 days	Applicable only to people in service at 30 September 2000
8 years	27 days	Applicable only to people in service at 30 September 2000
10 years	28 days	
18 years	30 days	
22 years	32.5 days	Applicable only to people in annual leave group 2 at 30 September 2000 and people with pay and pension protection to a former annual leave group 2 grade at Newgrid implementation.

BT Holidays no longer exist. These have been incorporated into the new arrangements. Whilst on Annual Leave, pay is calculated on basic salary plus any London weighting, assigned Allowances or shift pay in force when the leave is taken. Where it is necessary to buy back unused annual leave this is calculated on basic salary including where appropriate London Weighting and Newgrid Pay and Pension Protection Supplement. If the annual leave allowance changes (eg for completing a specified length of service), the total leave allowed in the year is made up of proportionate amounts of the appropriate leave allowances, any fraction rounded up to the next whole day.

### **Day & hours equivalents.**

People employed on part-time/job sharer contracts receive a proportion of the personal holidays detailed above according to their length of service and the number of hours they work. The holidays should be converted and recorded in hours, as follows:-

Personal Holidays = Full-time equivalent holidays in hours x weekly part-time hours / weekly full-time hours.

If the pattern of taking holidays results in too small an amount of hours left to take the half day of holiday at year end the following options will be made available:-

- the time will be rounded up to enable a half day to be taken, without bringing forward any holiday allowance from the following year,
- the time to be rounded up and carried forward to the following year.

### **Forms / standard letters.**

Leave Record Cards are available from Gatekeeper.

### **FAQs.**

**Q.** How is leave entitlement calculated if I join part way through the year?

**A.** This is done on a pro rata basis rounded to the nearest half day. For example, if you join on 1st August, this is 4 months into the holiday year and therefore you are entitled to 8/12ths (i.e. 2/3rds) of your normal annual entitlement for that year. If you are on sick leave at sick pay rates or you have taken more than 4 weeks special leave your holiday entitlement will be reduced on a pro rata basis.

**Q.** How is leave calculated for someone leaving the company part way through the year?

**A.** Leave entitlement is calculated on a pro rata basis as above. All outstanding leave should be taken during the notice period, and can be used to bring forward or delay the last day of service. If outstanding leave cannot be taken due to operational reasons, it may be paid for. Leave taken over and above the pro rata entitlement has to be refunded. (For specific reasons relating to end of service with the company such as Death in Service and Dismissal exceptions may be made).

**Q.** Can I save up leave from one year and carry it over to the next eg. for a special holiday?

**A.** This is possible with the prior agreement of your manager. You should discuss it fully with him/her before making any definite plans.

CWL members are reminded and encouraged to always try and book the annual leave they desire, even if you know your request will not be granted. You need your refusal codes, that way we can prove you have tried to take your annual leave in accordance with BT policy. Refusal codes are a handy tool. Remember to book rostered days off, if they fall within your desired annual leave period; it will not affect your leave card, but should your attendance roster be changed it will be booked.

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## **Special leave for medical appointments:-**

**The simplest way for us to advise on this, is to just reprint the letter received by the CWU, 22 June 2009.**

22 June 2009

Dear Ms Mitchell

### **HOSPITAL APPOINTMENTS – TIME OFF FOR MEDICAL PURPOSES**

Thank you for your letter of 3 June 2009 seeking clarity on the company's position on the issue of time off for hospital appointments. I think, for the sake of clarity, I should set out verbatim what the policy actually states and follow that with a few words that will help to simplify and clarify what the company's approach is and how it should be interpreted by managers.

The section of the policy that applies is set out below:

#### **Time off for Medical Appointments:**

Medical appointments, including GP and dental appointments should where possible be arranged during leave or scheduled time off, or an attendance swap arranged. In exceptional circumstances where this is not possible, maximum notice should be given of the need to take time off from work, for which casual leave may be requested. Every effort should be made to make arrangements which minimise the impact on the business, for example by seeking an early or late appointment.



Where regular medical appointments are necessary in respect of a disability, this should be managed under the principles of Managing Changing Capabilities. The manager, taking advice where necessary from the OHS should consider the need to make reasonable adjustments to the individual's attendance arrangements. This adjustment can be supported by one or more of the following options: paid special leave; casual leave; use of annual leave; temporary reduction in hours, flexible attendance according to the individual circumstances of the application.

Applications for leave relating to hospital appointments required for urgent diagnostic tests, consultations or emergency treatment should be considered under paid special leave terms.

For ease of understanding I will comment separately on each of the 3 paragraphs in the same order.

Paragraph 1 which refers to medical appointments in general is clear in that all employees are expected, wherever possible, to make every effort to arrange appointments outside of work time. Failing this, they can ask for casual leave which may be granted by the line manager. Casual leave can be up to 4 hours or half a day's paid leave to attend a one off appointment or deal with an emergency that does not fit within the special leave definition. The individual will normally be required to make up the time taken within a reasonable timeframe that should be agreed with their line manager, except in cases of distress.

On the paragraph regarding the management of a disability I think that is clear and needs no further explanation.

The real issue, as I see it, is in the interpretation of the final paragraph regarding special leave for hospital appointments. In your letter you accept that hospital appointments beyond the initial appointment can be scheduled and that this should be done in a way that minimises disruption to the business. Nonetheless we recognise that depending on working patterns, this may mean that hospital appointments will be during work time. In these instances, paid special leave should be considered and not be unreasonably refused. The company, however recognises that initial hospital appointments whether it be for consultation or medical tests are not always within the control of the individual and in these instances paid special leave should be granted.

I trust the above clarifies the company's position.

Yours sincerely A Park

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## Special leave procedure/Discretionary paid leave

BT intranet 2014

**Applications for paid Discretionary leave should be made to the employees line manager. The line manager should consider the individual circumstances of the application and decide whether paid leave is appropriate and if so the number of days up to the maximum levels shown below.**

All periods of authorised paid special leave should be recorded locally i.e. on the individual's annual leave record. It is not possible to list every eventuality and line managers may consider that a measure of paid leave is appropriate in circumstances that are not listed here.

**Paid leave is normally appropriate in the following circumstances, but see "Conditions":**

<b>Type of leave</b>	<b>Length</b>	<b>What for</b>	<b>Conditions</b>
<b>FAMILY REASONS</b>			
Family Bereavement	An unspecified amount of paid special leave but normally at least 5 days would be offered	Husband/wife, civil partner spouse equivalent, same sex partner/spouse equivalent or child.  (A spouse equivalent would be somebody who lives with an employee and could reasonably be regarded as being in the same relationship as a husband or wife.)	In deciding the amount of paid special leave, account should be taken of the closeness of the relationship that the employee had with the deceased, whether or not the employee has the responsibility for making the funeral arrangements, and if long distance travel is involved  Paid special leave may also be appropriate on the death of a more distant relative, or somebody who is not a relative, if the person had a special relationship with the employee, e.g. somebody who shared a residence with the employee, acted as a guardian, or performed the role of one of the relatives listed above. Contd..
Family Bereavement	Up to 5 days	On the death of a partner or same sex partner (i.e. somebody who has a special relationship with, but does not actually live with, the employee. e.g. a fiancé or fiancée, an immediate blood relative or equivalent, e.g. parents, brother, sister, grandparent.	NB Additional discretionary leave may be offered in circumstances of on-going and severe bereavement /distress this may be on a paid or unpaid basis
Nursing Sick Relatives	Up to 2 weeks	To nurse or care for a sick or elderly relative	Can be allowed for each case of illness
Urgent Domestic Problems	Up to 5 days	By their very nature, these will vary considerably and cannot be precisely defined.	Can be allowed for each incident.
<b>SOCIAL REASONS</b>			
First Aid	Time needed for	BT First Aiders.	

		attending training courses or participating in competition.	
Annual training in the Reserve & Auxiliary Forces	Up to 2 weeks	Attending training camps for annual training as an obligation of membership of the reserve & auxiliary forces.	NB - For Volunteer Reserve Forces: Arrangements that apply during periods of National Conflict - see replacement for ISIS PNL/EMP/A042
Sport & Recreation		Competitors or officials at major national or international competitions.	
Voluntary organisations		e.g. Special Constabulary, Mountain Rescue and Lifeboat Service	Employees may be allowed paid special leave to serve in a voluntary organisation which provides a service to the community.
Youth Leadership Training	Up to 5 days leave in any 12 month period.	Attending youth leadership training courses, e.g., Scouting, Cadet associations.	
BT related/sponsored training and/or examinations	Up to 1 days study leave per exam paper and ½ day to attend each examination	For revision leave and/or to attend examinations	BT full or part sponsored training/study. BT related training
Investitures		Commandment to attend an investiture or receive the Duke of Edinburgh's Gold Award	

**PLEASE NOTE THIS BOOKLET IS A GUIDE ONLY**

***IF YOU NEED FURTHER ADVICE REGARDING ANY OF THE  
ISSUES WITHIN THE BOOKLET PLEASE DO NOT HESITATE TO  
CONTACT US.***

***IF YOU THINK THERE ARE OTHER ISSUES; THAT NEED  
CLARIFYING OR YOU THINK WE SHOULD ADD TO THIS, PLEASE  
LET US KNOW***

***ALL FEEDBACK WILL BE GREATLY APPRECIATED***

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