



# Beacon Academy Trust

A COMPELLING VISION FOR SUCCESS

## **STAFF SPECIAL, COMPASSIONATE AND UNPAID LEAVE POLICY AND PROCEDURE**

<b>Approving Body</b>	Trust
<b>Date of Last Review</b>	June 2018
<b>To be Reviewed</b>	February 2021
<b>Statutory (Y/N)</b>	N
<b>Signed/Authorised</b>	Kathryn Burns, CEO

## **I. INTRODUCTION – PURPOSE, MEANING AND SCOPE**

1. BMAT recognises that employees' lives outside of the workplace may give rise to a range of demands and commitments. This policy is designed to reflect these needs in the context of employment legislation and the business objectives and imperatives of BMAT.
2. This policy is not intended to be an exhaustive list of triggers for special leave. Should a scenario arise which is not covered below, further advice and guidance should be sought from HR.
3. In considering the application of special leave, managers should be mindful of the need for equitable treatment.
4. Scope: This policy applies to all employees of the BMAT, irrespective of length of service, and whether they are part time or full time, or on a fixed term contract.
5. Definition of special leave: For the purpose of this policy, special leave is defined as any form of leave which does not comprise all or part of:
  - a. An employee's annual leave allowance;
  - b. Paid or unpaid parental leave;
  - c. Ordinary and/or additional maternity leave, paternity leave or adoption leave;
  - d. Public bank holidays;
  - e. Sickness absence.
6. Special Leave is intended to assist employees in dealing with exceptional circumstances which may be sudden, serious and extreme in nature, for example in the case of sudden serious illness, accident or an emergency hospital visit.
7. There is no statutory entitlement to paid special leave. At the discretion of the Trust Executive and in consultation with HR, special leave will normally be paid. However, there may be circumstances where special leave will be unpaid, such as when an employee has had frequent absences.
8. If an employee wishes to request special leave, they must inform their manager of the reason for the absence and how long they expect to be absent from work, as soon as is reasonably practicable. Granting of special leave is at the discretion of managers.
9. All requests for special leave both planned and un planned should be made by completing an Application for Leave of Absence form which can be found in the Repository under HR News/Forms/Absence, see copy at Appendix A.

10. Types of special leave: Instances of special leave usually fall into one of the following classifications:

- a. Dependency leave;
- b. Compassionate leave;
- c. Unforeseen domestic emergencies;
- d. Jury service or time off for public duties;
- e. Religious observance; or
- f. Other unpaid leave.

## **II. DEPENDENCY LEAVE**

11. All BMAT employees are entitled to take a reasonable amount of time off, usually no more than two days per occasion, depending on the circumstances, and no more than two occasions per year, in order to care for or offer non-routine assistance to a dependent in the following circumstances:

- a. To provide assistance when a dependant falls ill, gives birth or is injured or assaulted;
- b. To make arrangements for the provision of care for an ill or injured dependant;
- c. Because of the unexpected disruption or termination of arrangements for the care of a dependant, and
- d. To deal with an incident that involves their dependant and occurs unexpectedly while their dependent is at school/other educational establishment.

12. A person is considered to be a dependent if they rely on another for assistance or support. This could be an employee's spouse/partner, child, parent, elderly relative, any other person who reasonably relies on the employee for assistance if he/she fell ill or was injured or assaulted, or who would rely on the employee to make arrangements for the provision of care in the event of illness or injury.

## **III. COMPASSIONATE LEAVE**

13. BMAT is sympathetic to the fact that employees will occasionally need time off from work for compassionate reasons such as during occasions of serious illness or injury affecting a dependent or due to bereavement.

14. Under these circumstances, employees should consult with their manager regarding the need for compassionate leave, who will in turn discuss the request with HR, and a

member of the Trust Executive if appropriate. The below should be used as a guide for granting paid leave on compassionate grounds:

- a. Up to 1 week (i.e. five working days) paid compassionate leave in the case of serious illness or death of a close relative or friend or a dependent.
  - b. Up to 2 days paid compassionate leave in the case of serious illness or death of other relatives or friends.
  - c. Up to 1 day paid compassionate leave in the case of funeral attendance.
15. Further paid compassionate leave maybe granted at the discretion of managers in consultation with the Trust Executive and HR, on a case by case basis. When considering requests for extended compassionate leave, BMAT will consider the particular circumstances of the case including:
- a. The distance needed to travel;
  - b. The level of responsibility for care;
  - c. The responsibility for funeral arrangements
16. Extended compassionate leave is likely to be unpaid.

#### **IV. UNFORESEEN DOMESTIC EMERGENCY LEAVE**

17. Employees will from time to time experience emergencies at home, such as a flood, fire, or burglary. BMAT wishes to enable those who experience genuine domestic emergencies to take a reasonable amount of time off work to deal with them.
18. This policy does not apply to planned events such as domestic repairs, refurbishment, building or trades work, installation of appliances, home deliveries, etc.
19. In the event of a domestic emergency arising, an employee should notify their performance manager as soon as it is reasonably practicable, explaining the nature of the emergency and how much time off work the employee thinks they will need. The leave request must then be recorded with HR.
20. It is BMAT policy to pay employees their normal rate of basic pay for up to the first day they are absent from work as a direct result of an unforeseen genuine domestic emergency. This is subject to the discretion of the Trust Executive and strictly on the basis that only the minimum time required to resolve the immediate emergency is taken. Partial, rather than full, days should be taken wherever possible.

21. Once the immediate emergency has been resolved, employees are expected to return to work or, if further time off is necessary, to arrange to take it as an unpaid absence, subject to the agreement of their manager.
22. If an employee requires frequent time off on account of domestic emergencies, their manager has the discretion either to require the employee make up the time and/or to grant further time off without pay.

#### **V. JURY SERVICE OR OTHER PUBLIC DUTIES**

23. In the event of being called for jury service, employees should contact their manager to request leave. In submitting a request for leave, employees should produce a copy of the court summons and should submit a claim to the court for loss of earnings. Employees will continue to be paid while on jury service at their normal rate of pay. Where reasonably practicable to do so, employees are obliged to return to work on any day or days when they are not required to attend court.
24. Other examples of public duties may include the requirement for staff to attend court in order to give evidence in a trial.

#### **VI. RELIGIOUS OBSERVANCE**

25. Employers are under no legal obligation to grant a religious-based request for time off work. However, the Trust is sensitive to the fact that employees may have particular religious or cultural needs for which time off work would be required where this need conflicts with their contractual working arrangements.
26. Requests for time off work for religious observance will be subject to the discretion of the Trust Executive and if approved will be limited to one day's paid leave per academic year. Further requests for time off work received during the same academic year if granted will be unpaid.

#### **VII. OTHER UNPAID LEAVE**

27. Employees are encouraged to make requests for unpaid leave as a last resort and when there is no reasonable alternative.
28. Employees may apply for unpaid leave of absence by making a request to their manager, which in turn should be approved by the Trust Executive in consultation with HR.

29. The written request should explain the purpose for which the leave is requested, the length of the proposed leave and an outline of the main tasks that will need to be covered during the employee's absence.

### **VIII. ABUSE OF THIS POLICY**

30. Any employee who abuses this policy by requesting or taking time off work in the context of the above, or similar, when such time was not required, who misrepresents their circumstances to obtain leave or fails to follow correct reporting and authorisation procedures will be subject to investigation in accordance with the [BMAT Disciplinary Policy](#).

### **VIX. EQUALITY ANALYSIS**

31. This policy is equally applicable to all employees regardless of their age, sex, marital or civil partnership status, racial or ethnic group, disability, sexual orientation, religion or belief. All employees will be required to follow the reporting requirements for leave as outlined above and managers should seek guidance from the Trust Executive or HR to ensure equity of treatment and consistent application of this policy.

32. The possible equality impact of this policy has been considered. Potential adverse effects have been identified as below, with counter measures:

- a. Employees with a disability - reasonable adjustments will be considered including flexible working practices to support the attendance of medical appointments and required procedures where possible. Requirements to make up time will be considered, where appropriate to an individual's role.
- b. Expectant mothers will not suffer detriment for the attendance of antenatal and pregnancy related appointments and flexible working practices may be considered to facilitate appointment attendance.
- c. Employees wishing to take time off for occasions of religious significance or in accordance with a particular belief will not be unfavourably treated. Unpaid leave absences will be considered to seek to accommodate this type of leave request, where business needs permit.

33. Employees who feel that a request for leave has been unreasonably withheld or feel that they have been treated unreasonably in the application of this policy should seek

to resolve the matter with their manager or HR in the first instance. If the outcome remains unsatisfactory, individuals are directed to the [BMAT Grievance Policy](#).

## APPLICATION FOR LEAVE OF ABSENCE

*To be completed when you need to take time off work in an emergency/exceptional circumstances (e.g. medical appointment, funeral, childcare, interview, etc.)*

**Please Note:** No leave should be taken prior to your leave of absence request being approved.

- For planned absences, at least 5 working days' notice is required
- Emergencies, notify line manager and complete form as soon as possible
- It is your responsibility to arrange cover for your duties

**Process:**

Support Staff: (1) Employee details (2) Principal/CEO (3) N/A (4) Line Manager (5) Human Resources

Teaching Staff: (1) Employee details (2) Principal/CEO (3) Cover (4) Line Manager (5) Human Resources

**Guidelines:** A copy of the Staff Special, Compassionate and Unpaid Leave Policy and Procedure is available to download from the BMAT website.

### (1) EMPLOYEE DETAILS

<b>EMPLOYEE DETAILS</b>	Name:		Department:	Name of line manager:	Date submitted:
	Payroll Number:				
<b>REASON FOR ABSENCE</b>	Reason for absence:				
<b>TYPE OF LEAVE</b>	Is your request for paid or unpaid leave? Paid <input type="checkbox"/> Unpaid <input type="checkbox"/>				
<b>DATES OF ABSENCE</b>	From (Date & Time):	To (Date & Time):	Please ✓ number of periods / days requested: Period 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> Total number of days requested: <input style="width: 50px;" type="text"/>		
<b>RETURN DATE</b>	Date of return:		Time of return:		
<b>MORE INFO</b>	Details of supporting documents attached:				
<b>ABSENCE HISTORY</b>	Please provide accurate details of your absence history to date for the current academic year (if unsure look on HR Self-Service System or contact Human Resources):				

Please note that incomplete forms will be returned and will delay the process.

**(2) AUTHORISATION**

CEO/ PRINCIPAL APPROVAL		Approved in line with policy <input type="checkbox"/>
NAME		With Pay <input type="checkbox"/> Without Pay <input type="checkbox"/>
SIGNATURE		Refused <input type="checkbox"/>
DATE		Reason:

**(3) COVER (TEACHING STAFF ONLY)**

COVER	Can this absence be covered? Yes <input type="checkbox"/> No <input type="checkbox"/>
SIGNATURE	If this absence cannot be covered please inform the Principal and Line Manager.
DATE	

**(4) LINE MANAGER NOTIFICATION**

LINE MANAGER	I can confirm that arrangements are in place to cover this absence.
NAME	
SIGNATURE	
DATE	

**(5) HUMAN RESOURCES**

HR SYSTEM UPDATE	Paid absence <input type="checkbox"/> update HR System. Unpaid absence <input type="checkbox"/> update HR System and pass to Finance Department/Payroll I can confirm that the absence history has been updated.
NAME	
SIGNATURE	
DATE	

Finance Department Use Only	
Date received:	
Date processed:	
Name:	
Signature:	