## Guide templates



the-hca.org

The templates below are offered as a starting point where existing organisational templates may not exist to support better discussions between employees and their manager/employer.

In all scenarios:

* Ensure that you have prepared for the meeting, gathering any relevant information required in advance, so that it can be as useful as possible
* Clarify for the employee that whilst you are taking notes, this is an informal meeting, intended to ensure they are supported effectively and appropriately
* Organise a quiet and private space, where you won’t be disturbed
* Make sure that you greet the employee warmly to make them feel at ease and supported
* Use fact-finding questions without being too intrusive - make sure that you actively listen to their responses
* Confirm that the matters discussed are confidential and will only be disclosed where necessary for legitimate business needs, such as payroll and health and safety
* Speak with your local HR team, or senior management for additional support where required, including information regarding any organisational processes and/or policies

# Upcoming Leave

|  |  |
| --- | --- |
| **Employee’s Name** |  |
| **Manager’s Name** |  |
| **Expected Leave** |  |
| **Anticipated Time Out of Office**  (if known)  Discuss with the employee how long they anticipate being out of the office, so that you are able to plan most appropriately for their period of absence.  NB. Make sure to consider any legal obligations arising from local employment legislation and do not apply unnecessary or unlawful pressure to the employee. |  |
| **How/When We Will Keep in Touch and What Things We Will Update Each Other On**  Consider and agree whether you will arrange a regular or recurring meeting for you to keep connected, or whether these will take place ad-hoc.  If so, how frequently will these happen? Will they be in-person or virtual?  What topics are most appropriate for each party to update on? |  |
| **Policies, Resources and People That May Be Helpful**  Are there any policies that may be helpful for the employee to be aware of considering this situation? If so, provide the employee with copies of the company’s policies and procedures that may be helpful, e.g. Sickness Absence, Compassionate Leave, Parental Leave, Employee Assistance Programme. |  |
| **Agreed Next Steps**  Are there any agreed actions that need to happen? When will you next speak? |  |

# Keeping in Touch Discussion

|  |  |
| --- | --- |
| **Employee’s Name** |  |
| **Manager’s Name** |  |
| **Date of Discussion** |  |
| **Key Employee Updates**  Has the employee shared anything that is important to note and capture? |  |
| **Key Organisational Updates**  Are there any key organisational updates for you to share with the employee  (e.g. team changes)? |  |
| **Policies, Resources and People That May Be Helpful**  Are there any policies that may be helpful for the employee to be aware of considering this situation? If so, provide the employee with copies of the company’s policies and procedures that may be helpful, e.g. Sickness Absence, Compassionate Leave, Parental Leave, Employee Assistance Programme. |  |
| **Agreed Next Steps/ Date of Next Discussion**  Are there any agreed actions that need to happen? When will you next speak? |  |

# Returning From Leave

|  |  |
| --- | --- |
| **Employee’s Name** |  |
| **Manager’s Name** |  |
| **Expected Return Date**  Consult with the employee, find out when they plan to return to work, and set their official return date. |  |
| **Role**  Discuss and agree any changes to the employee’s role or terms of employment before their return, and provide an updated job description where relevant.  NB. Make sure to consider any legal obligations arising from local employment legislation. |  |
| **Compensation and Benefits**  Re-instate any compensation or benefits that may have been suspended or reduced during period of leave. |  |
| **Logistics**  Arrange for equipment to be available for the employee to use from their first day back at work. If working within an office, ensure there is an appropriate workspace available and  set-up for their return.  Arrange to greet the employee and welcome them back to the workplace. |  |

# Checklist for Managing Return from Maternity Leave

*(modified from a template offered via CIPD HR Inform)*

|  |  |
| --- | --- |
| **Return Date**  Consult with the employee, find out when they plan to return to work, and set their official return date. |  |
| **Policies**  Provide the employee with copies of the company’s policies and procedures which apply to parents (e.g., the right to request flexible working, parental leave, and time off to deal with emergencies).  Should they apply for flexible working, consider the application in a timely manner. |  |
| **Role**  Discuss and agree any changes to the employee’s role or terms of employment before their return, and provide an updated job description where relevant.  NB. Make sure to consider any legal obligations arising from local employment legislation.  If temporary maternity leave cover was arranged, start preparations for the end of the temporary employee’s contract, ideally allowing for a short handover period.  Discuss the employee’s workload. Give consideration to a ‘phased return’ to normal duties if this would be beneficial. |  |
| **Annual Leave/PTO**  Calculate if the employee has any outstanding or accrued annual leave/PTO. Consult the employee about when they wish to take leave they are owed. |  |
| **Benefits**  Re-instate, or if necessary compensate for, any benefits that were suspended during the maternity leave period.  Give the employee information about any parent or child benefits offered by the company (such as childcare vouchers or an on-site nursery). Make sure the employee knows how to access these benefits. |  |

# Return from Maternity Leave Cont.

|  |  |
| --- | --- |
| **Breast-feeding**  If necessary, arrangements for breast-feeding facilities should be made available to the employee (including a suitable rest area). |  |
| **Compensation**  Ensure their salary is calculated correctly (including any adjustments due to Flexible Working request) and an annual salary review has taken place. |  |
| **Logistics**  Arrange for an appropriate work station and equipment to be available for the employee to use from their first day back at work. Where possible, it is a good idea for the employee  to return to the work station they had before they went on maternity leave.  Arrange to greet the employee and welcome them back to the workplace. |  |
| **Internal Communications**  Inform the employee’s colleagues of their return to work date. |  |
| **Training and Development**  Arrange any training necessary for the employee to be fully competent in their duties. This may include training they have missed while on maternity leave, re-training, or training for new duties.  Undertake a formal appraisal at an appropriate point. If an appraisal is due immediately after the employee’s return, agree an appropriate timescale for it to be rescheduled to. |  |
| **Additional Support**  Offer the employee access to any support schemes that exist, such as buddying, counselling and training, or consider setting up support mechanisms. |  |