# See the source imageBlue front cover with white Business Disability Forum Logo in bottom left corner

Tailored Adjustments Plan

[Name of employee]

(Directorate)  
People leader: [Name of People leader]

[Date of last review]

What is a ‘Tailored Adjustments Plan’?

This ‘Tailored Adjustments Plan’ is a living record of adjustments agreed between an employee and their people leader.

The purpose of this Plan is to:

* Ensure that the employee and people leader have a record of what has been agreed;
* Minimise the need to re-negotiate adjustments each time the employee changes jobs, is re-located, or assigned a new people leader within the organisation;
* Provide employees and their people leaders with a structure for discussions about workplace adjustments.

This plan can be reviewed and amended as necessary with the agreement of both the employee and people leader:

* At any regular one-to-one meeting;
* At a return to work meeting following a period of sickness absence;
* At appraisal or performance review meetings;
* Before a change of job or duties or introduction of new technology or ways of working;
* Before or after any change in circumstances for either the organisations or the employee.

Notes for People Leaders

This is a live document and should be reviewed regularly by both the employee and people leader and amended as appropriate. Remember, however, that expert advice from third parties (such as [Occupational Health](https://officesharedservice.sharepoint.com/sites/HealthandWellbeingHub/SitePages/Occupational-Health.aspx) advisers, Access to Work, or IT specialists) may be needed before changes can be agreed and implemented. People leaders who need help in deciding whether or not an adjustment is ‘reasonable’ will find it helpful to use the **‘Reasonable adjustment decision and form**’ available from the Advice Service at Business Disability Forum:

Email: [advice@businessdisabilityforum.org.uk](mailto:advice@businessdisabilityforum.org.uk)

Phone: 020 7403 3020

The agreement allows the people leader to:

* Understand how a particular employee’s disability or condition affects them at work;
* Explain the needs of the business or organisation;
* Explain the organisation’s attendance and reasonable adjustments policy;
* Recognise signs that an employee might be unwell and know what the employee wants you to do in these circumstances including who to contact for help;
* Know how and when to stay in touch if the employee is off sick;
* Consider whether or not the employee needs to be referred for an assessment by an [Occupational Health](https://officesharedservice.sharepoint.com/sites/HealthandWellbeingHub/SitePages/Occupational-Health.aspx) or another adviser to help both parties understand what adjustments could be effective;
* Review the effectiveness of the adjustments already agreed;
* Explain any change in the employer’s circumstances.

Notes for employees

The ‘Tailored Adjustments Plan’ allows employees to:

* Explain the impact of a disability or condition at work;
* Suggest adjustments that will make it easier for the employee to do their job;
* Offer further information from the employee’s doctor, specialist, or other expert (where relevant);
* Inform a referral to Occupational Health (to be done by the people leader), or an assessment by Access to Work, or another expert;
* Review the effectiveness of the adjustments agreed;
* Explain any change in the employee’s circumstances;
* Be reassured that the people leader knows what to do if the employee becomes unwell at work and who to contact if necessary;
* Know how and when the people leader will keep in touch if the employee is absent from work because of illness or a disability-related reason.

# Tailored Adjustments Plan

Employee: A disability or condition at work

|  |  |  |
| --- | --- | --- |
| **The disability or condition has the following impact at work:** | | |
|  | | |
| **I need the following agreed reasonable adjustments (refer to Access to Work agreement if relevant):** | **Date budget holder contacted if relevant:** | **Date implemented:** |
|  |  |  |

**If a condition fluctuates**

|  |
| --- |
| **When the employee is feeling well (i.e. on a ‘good’ day), their disability or condition has the following impact on them at work:** |
|  |
| **When the employee is feeling unwell (i.e. a ‘not so good’ or ‘bad’ day), the employee experiences the following symptoms which may indicate they are not well enough to be at work:** |
|  |

**Contact details in case of an emergency**

If the employee is not well enough to be at work, they are happy for the people leader to contact any of the following in the order of preference indicated below:

|  |  |
| --- | --- |
| **First contact**  **Name:**  **Relationship to employee:** | **Second contact**  **Name:**  **Relationship to employee:** |
| Address:  Telephone:  Email address: | Address:  Telephone:  Email address: |

Additionally, please make sure the employee’s Emergency Contact details on IBC are up to date. The employee can amend this using the ‘My Information’ app.

The employee should inform the people leader if there are changes to their condition which have an effect on their work and/or if the agreed adjustments are not working. They should then meet privately to discuss any further reasonable adjustments or changes that should be made.

If the people leader notices a change in the employee’s performance at work or feels these adjustments are not working, the employee and the people leader should meet to discuss alternatives.

People leader: How to support [Name of employee]

**Keeping in touch**

If the employee is absent from work on sick leave or for a reason relating to their disability of condition for more than [XX] days and have followed the usual procedures for notifying the organisation of their absence, the people leader will keep in touch in the following way:

|  |  |
| --- | --- |
| **Who will contact whom?** |  |
| **How will contact be made?** | (for example, email, telephone, text, letter) |
| **How often?** | (for example, daily, weekly, monthly) |
| **When?** | (for example, preferred day and time) |

**Conversations while the employee is on sick leave**

|  |
| --- |
| **These are the topics the employee and people leader have agreed to discuss when keeping in touch:**  **Examples include:**   * **How the employee is feeling;** * **What the people leader can do to help;** * **Planned phased return to work;** * **Return to work date.** |

**Return to work**

When the employee is ready to return to work after a period of sickness or disability related absence of more than [x] days, the employee and people leader will meet to review this Plan and make any necessary amendments.

|  |
| --- |
| **At this return to work meeting, the following will be discussed:** |
| For example:   * Current work issues; * A phased return/back to work plan; * What to tell the team; * Assessments to review existing reasonable adjustments (this may include Access to Work, GP, or [Occupational Health](https://officesharedservice.sharepoint.com/sites/HealthandWellbeingHub/SitePages/Occupational-Health.aspx), for example) and identify new adjustments that might be needed. |

**Unexpected absences from work**

|  |
| --- |
| **If the employee is absent from work and has not followed usual procedures for notifying us that they are sick or absent for a reason relating to their disability or condition, the people leader and employee have agreed the people leader will do the following:** |
| For example;   * Try to contact the employee on their mobile; and/or * Notify the emergency contact (details above). |

# Sharing this Tailored Adjustments Plan

An up-to-date copy of this form will be retained by employee/people leader/People Services. The latest version of this should be uploaded to the employee’s ePF by the people leader using the ‘Manage ePF’ app on IBC.

A copy of this form may also be given to a new or prospective people leader with the prior consent of the employee.