

Human Resources Committee

Tuesday 24 January 2023

2.00 pm Luttrell Room - County Hall,
Taunton



SOMERSET
County Council

To: The Members of the Human Resources Committee

Cllr L Leyshon (Chair), Cllr S Aujla, Cllr A Dingwall, Cllr D Fothergill, Cllr A Kendall, Cllr M Healey, Cllr G Oakes, Cllr E Pearlstone, Cllr L Redman, Cllr D Rodrigues, Cllr T Robbins, Cllr M Stanton and Cllr S Wakefield

All Somerset County Council Members are invited to attend meetings of the Cabinet and Scrutiny Committees.

Issued By Scott Wooldridge, Strategic Manager - Governance and Risk and Monitoring Officer - 16 January 2023

For further information about the meeting, please contact Neil Milne on 01823 359045 or neil.milne@somerset.gov.uk or Sarah Wright (Democratic Service Officer) on 01823 356151 or sarah.wright@somerset.gov.uk

Guidance about procedures at the meeting follows the printed agenda.

This meeting will be open to the public and press, subject to the passing of any resolution under Regulation 4 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012.

This agenda and the attached reports and background papers are available on request prior to the meeting in large print, Braille, audio tape & disc and can be translated into different languages. They can also be accessed via the council's website on www.somerset.gov.uk/agendasandpapers



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AGENDA

Item Human Resources Committee - 2.00 pm Tuesday 24 January 2023

*** Public Guidance notes contained in agenda annexe ***

1 Apologies for Absence

To receive apologies for absence.

2 Declarations of Interest

Details of all Members' interests in District, Town and Parish Councils can be viewed on the Council Website at [County Councillors membership of Town, City, Parish or District Councils](#) and this will be displayed in the meeting room (Where relevant).

The Statutory Register of Member's Interests can be inspected via request to the Democratic Service Team.

3 Minutes from the previous meeting on 13 December 2022 (Pages 9 - 16)

The Committee is asked to confirm the minutes are accurate.

4 Public Question Time

The Chair will allow members of the public to present a petition on any matter within the Committee's remit. Questions or statements about any matter on the agenda for this meeting will be taken at the time when each matter is considered.

5 Pension Policy and Processes (Pages 17 - 34)

- To consider and note the Policy and appendices.

6 Chief Officers Annual Leave Entitlement

- Report to follow.

7 Dynamic Working Strategy (Pages 35 - 76)

- To receive the presentation and report. To approve the Strategy.

8 LGR People Workstream Update

- To consider a verbal presentation.

9 Any other urgent items of business

Item Human Resources Committee - 2.00 pm Tuesday 24 January 2023

The Chair may raise any items of urgent business.

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Guidance notes for the meeting

1. **Council Public Meetings**

The Local Authorities and Police and Crime Panels (Coronavirus) (Flexibility of Local Authority and Police and Crime Panel Meetings) (England and Wales) Regulations 2020 have given local authorities new powers to hold public meetings virtually by using video or telephone conferencing technology.

2. **Inspection of Papers**

Any person wishing to inspect minutes, reports, or the background papers for any item on the agenda should contact Democratic Services at democraticservices@somerset.gov.uk or telephone 07790577336/ 07811 313837/ 07790577232

They can also be accessed via the council's website on www.somerset.gov.uk/agendasandpapers.

Printed copies will not be available for inspection at the Council's offices and this requirement was removed by the Regulations.

3. **Members' Code of Conduct requirements**

When considering the declaration of interests and their actions as a councillor, Members are reminded of the requirements of the Members' Code of Conduct and the underpinning Principles of Public Life: Honesty; Integrity; Selflessness; Objectivity; Accountability; Openness; Leadership. The Code of Conduct can be viewed at: [Code of Conduct](#)

4. **Minutes of the Meeting**

Details of the issues discussed, and recommendations made at the meeting will be set out in the minutes, which the Committee will be asked to approve as a correct record at its next meeting.

5. **Public Question Time**

If you wish to speak, please contact Democratic Services by 5pm 3 clear working days before the meeting. Email democraticservices@somerset.gov.uk or telephone 07790577336/ 07811 313837/ 07790577232.

You will be sent a link to the meeting to attend virtually or alternatively you can telephone into the meeting and listen to the proceedings using the phone number and ID for the meeting.

At the Chair's invitation you may ask questions and/or make statements or

comments about any matter on the Committee's agenda – providing you have given the required notice. You may also present a petition on any matter within the Committee's remit. The length of public question time will be no more than 30 minutes in total.

A slot for Public Question Time is set aside near the beginning of the meeting, after the minutes of the previous meeting have been agreed. However, questions or statements about any matter on the agenda for this meeting may be taken at the time when each matter is considered.

You must direct your questions and comments through the Chair. You may not take a direct part in the debate. The Chair will decide when public participation is to finish.

If there are many people present at the meeting for one particular item, the Chair may adjourn the meeting to allow views to be expressed more freely. If an item on the agenda is contentious, with a large number of people attending the meeting, a representative should be nominated to present the views of a group.

An issue will not be deferred just because you cannot be present for the meeting. Remember that the amount of time you speak will be restricted, to three minutes only.

In line with the council's procedural rules, if any member of the public interrupts a meeting the Chair will warn them accordingly.

If that person continues to interrupt or disrupt proceedings the Chair can ask the Democratic Services Officer to remove them as a participant from the meeting.

6. **Meeting Etiquette**

- Mute your microphone when you are not talking.
- Switch off video if you are not speaking.
- Only speak when invited to do so by the Chair.
- Speak clearly (if you are not using video then please state your name)
- If you're referring to a specific page, mention the page number.
- Switch off your video and microphone after you have spoken.

7. **Exclusion of Press & Public**

If when considering an item on the agenda, the Committee may consider it

appropriate to pass a resolution under Section 100A (4) Schedule 12A of the Local Government Act 1972 that the press and public be excluded from the meeting on the basis that if they were present during the business to be transacted there would be a likelihood of disclosure of exempt information, as defined under the terms of the Act.

If there are members of the public and press listening to the open part of the meeting, then the Democratic Services Officer will, at the appropriate time, remove the participant from the meeting.

8. **Recording of meetings**

The Council supports the principles of openness and transparency. It allows filming, recording and taking photographs at its meetings that are open to the public - providing this is done in a non-disruptive manner. Members of the public may use Facebook and Twitter or other forms of social media to report on proceedings. No filming or recording may take place when the press and public are excluded for that part of the meeting. As a matter of courtesy to the public, anyone wishing to film or record proceedings is asked to provide reasonable notice to the Committee Administrator so that the relevant Chair can inform those present at the start of the meeting.

We would ask that, as far as possible, members of the public aren't filmed unless they are playing an active role such as speaking within a meeting and there may be occasions when speaking members of the public request not to be filmed.

A copy of the Council's Recording of Meetings Protocol is available from the Committee Administrator for the meeting.

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HUMAN RESOURCES COMMITTEE

Minutes of a Meeting of the HR Committee held in the Luttrell Room - County Hall, Taunton, on Tuesday 13 December 2022 at 2.00pm

Present: Cllr L Leyshon (Chair), Cllr E Pearlstone, Cllr L Redman, Cllr M Stanton, Cllr D Rodrigues, Cllr A Kendall, Cllr S Wakefield, Cllr S Ajula, Cllr D Fothergill, Cllr T Butt Philip (substitute for Cllr G Oakes).

Committee members attending virtually: Cllr A Dingwall, Cllr T Robbins

Other Members present: None

Other members attending virtually: Cllr R Woods, Cllr M Lovell.

Absent: Cllr M Healey

Cllr Liz Leyshon welcomed all to the meeting including members of the public and explained that she was chairing in her capacity as lead Member for Finance and Resources. She stated that this was the third monthly meeting of this Committee and that the Committee has powers delegated to it by Full Council in the area of human resources, meeting as and when required, reporting as necessary to Full Council. The principle functions of the Committee are to determine monitor, review and amend staffing policies and practices to secure the best use and development of the Council staff, including the power to deal with all matters relating to staff terms and conditions.

12. Apologies for absence – Item 1

Cllr A Dingwall (also attending online), Cllr G Oakes (sent substitute), Cllr T Robbins.

13. Declaration of Interest – Item 2

- a) Cllr Leyshon and Cllr Kendall declared a personal interest as members of the Local Government Pension Scheme.
- b) Cllr Dingwall declared that in relation to item 5 LGR HR Policies for Approval - Parental Bereavement Leave, he has raised a significant amount of money for charity fundraising.

14. Minutes from the previous meeting held on 17 November 2022 – Item 3

The minutes were approved as a true and accurate record.

15. Public Question Time – Item 4

There were no public questions, statements, or petitions.

16. LGR HR Policies for approval – Item 5

The Chair welcomed the Director of Customers, Digital and Workforce – Chris Squire to the meeting and thanked him for his attendance at this busy time. The Officer introduced HR Policy and Projects Service Manager – Sarah Welland who highlighted the following:

- Summary table (appendix 1) with two categories of policies where those marked yellow shows no substantive changed from the existing policies to the proposed Somerset Council policy from April 2023; and those marked blue where there is a significant change to the existing policies or a contentious issue for consideration.
- Four 'yellow' policies were presented for discussion.
- **Parental Bereavement Leave Policy** – No district currently has a formal specific policy so the proposed policy is a continuation of the SCC policy. Questions were invited. A Councillor asked if this policy would be in addition to the maternity policy in the case of still birth. The Officer confirmed that was correct (see first paragraph) and also the Compassionate Leave Policy. It would also apply to late abortion. A Councillor asked for consideration in the policy of the increasing role that grandparents play in many children's lives and who may offer a large supporting role in such circumstances. The Officer agreed to consider the implications of grandparental leave and stated that compassionate leave would also apply. It was stated that such policies directly reflect the culture of an organisation and should direct the behaviour of managers. The Committee noted the new policy.
- **Fostering Policy** – No district has a formal policy so the working group has taken the existing SCC policy and worked with the Fostering Team to formulate the proposed policy offering 8 days paid leave (Sedgemoor previously offered 5 days, other districts did not specify). Questions were invited. A Councillor asked whether the policy offers 8 days per year in total and questioned how this would impact a short-term foster career with multiple placements over the course of a year. The Officer said that the policy currently reads as 8 days per child per year but that the impact of this would be considered and period of leave clarified to the committee at a future meeting. It was suggested that reference could also be made to the varying multiple fostering arrangements, including short-term arrangements such as respite care. Cllr Butt Philip declared an interest that he was being considered as a Special Guardian. The Chair stressed the importance of this policy, particularly with regard to the Council Tax 50% reduction for Foster Carers. A Councillor asked for an indication of how often foster parent leave had been granted and the level of leave required from a Foster Carers perspective. The Officer explained that these

discussions have taken place and that workplace data could be presented. A Councillor stated the need to offer adequate support to Foster Carers via uncomplicated guidelines. The Chair was in agreement with this suggestion and of managerial discretion. The Fostering Policy will be re-presented at a future meeting.

- **Disclosure Policy:** The proposed policy is primarily based on the Code of Practice and refers managers and other staff who are using the DBS checking system to the gov.uk guidance to ensure the most up to date guidance on disclosure. The Committee noted the policy.
- **Recruitment of Ex-offenders Policy:** The proposed policy is very similar to the existing SCC policy with a reference to acting as an umbrella body. Where this is the case, and access to DBS checks is given to non-registered organisations, those organisations would be required to have a clear and positive statement about the recruitment of ex-offenders, and also cover the issue in contractual arrangements. Questions were invited. A Councillor agreed that this policy represents a positive change and asked if recruiting managers, particularly when from districts with no pre-existing policy, would receive further data protection training to handle sensitive information. The Officer agreed to discuss the requirement with the Recruitment Team for recruitment of ex-offenders and also for disclosure. The Committee noted the policy.
- One 'blue' policy was presented for discussion.
- **Flexible Working Request Policy:** All existing districts and SCC were broadly in line with existing policies regarding employees right to request flexible working arrangements, a statutory entitlement, which require a minimum of 26 weeks service before a request can be made, with SCC having a day one right to request flexible working. It is likely that the statutory right will reduce to day one, and it is proposed that Somerset Council allow requests to be made from day one as a flexible employer in line with the current employment market. The substantive change to the policy is the removal of information regarding business-led request from an employer, with the policy retaining employees' rights to request flexible working. Questions were invited. A Councillor asked for clarification of flexible working, hybrid working arrangements and contractual home-working, and whether reference should be made that this is an employees' personal choice whether or not to request flexible working. The Officer referred to current work of the Dynamic Ways of Working Strategy which relates to an employee working where work is best completed, not necessarily where the employee chooses. Benefits of working from home or from different locations can be great for employees and employers, particularly in terms of morale and motivation, which has been particularly

important for social workers. Dynamic Ways of Working enables discussion where employees are reluctant to be office-based to determine the best location for work to be completed. Examples were given of work best completed at home such as report writing and online meetings, and tasks best completed in the office such as staff supervision. Evidence shows that the quality of supervision has declined in the pandemic, where emotional connections and interventions were not taking place. The policy offers a consistent approach across the five to enable sensible discussions to allow the continuation of some of the huge benefits of home working to without this becoming a fundamental right. Pilots are taking place in a number of areas which currently involve teams agreeing effective ways of working and then developing a charter to document this. With the re-opening of B Block, there is now a genuine choice of work location. A Dynamic Ways of Working Policy will be formulated in the coming months. The Officer stated that dynamic working can allow greater accessibility and equal opportunities for employees which is clearly documented by other organisations. A Councillor asked for data on the present level of flexible working within SCC, post-pandemic. The Officer agreed to provide data from HR Advisory in terms of number of flexible working requests and what proportion are supported. It is thought that the vast majority of employees are working flexibly. A Councillor asked for clarification on flexible working patterns. The Officer explained that this is how an employee chooses to complete their contracted hours, for example, a full time employee may choose to work three long days and two shorter days, or extend their work hours over nine days a fortnight. In general, working pattern is a contractual arrangement and dynamic working is how you approach those hours such as occasional evening working hours, offset by a later morning start as a short term response. The Officer stated that management of recording work hours can be administratively heavy. A Councillor asked how this is monitored to ensure employees are not working additional hours over contract, and if devices can track work hours. The Officer stated that this is an area that managers are expected to manage as part of regular line management supervision, and that staff are not centrally monitored routinely but that this can be done if required. An awareness of excessive working hours is important to safeguard employees. It was noted that a large amount of unpaid additional hours are currently being worked as part of LGR. A Councillor re-iterated that there must be high regard for employee wellbeing at all times. Reference was made to employee email signatures where it is stated that emails may be sent out of usual working hours but that a reply is not expected until the recipients usual work pattern. A Councillor expressed concern about

informal dynamic ways of working arrangements and questioned the development of a policy as opposed to a culture of permissive dynamic working in a tribunal situation. The Officer explained that the Dynamic Working Strategy also considers travel and climate change for example. The Officer confirmed that the policy relates to the statutory right to make a request for flexible working. There was support for the policy and the right to request flexible working from day one as a general improvement in the culture of the new council. There was however, concern about the LGR pressures that some staff are finding themselves under. It was agreed that the culture of the new council should be set from day one and should draw good practice from all five councils. Work on culture, including the workshops has the full support of the Chief Executive which will continue after Vesting Day. The Officer explained that some HR functions will migrate to Microsoft Dynamics (from SAP). The Committee unanimously approved the policy. The Chair thanked the Officers for attending and for their committed work.

The members of the HR Committee formally approved the new employment policies which meet the previously agreed criteria for use in the new Somerset Council with effect from 1 April 2023.

The members of the HR Committee noted for information purposes only, the new policies listed, fall into the category of being a change to one or more of the District Council's existing policies, but no significant change to the existing SCC policy.

17. LGR People Workstream Update

The Committee received a presentation from the Director of Customers, Digital and Workforce – Chris Squire as the Lead Officer of the LGR People Workstream.

The following points were highlighted:

- Behaviours and Cultures – The progress of Culture Workshops have been affected by staffing capacity where staff resources have been prioritised to payroll, appointments, day one readiness etc but continue to receive the full support of the Chief Executive. There are plans for two further Culture Workshops ahead of Vesting Day with work also continuing in the new authority. 50+ Culture Navigators will continue their role particularly with the Dynamic Working Strategy
- Diversity and Inclusion – A small number of policies have been sent to the Joint Negotiation Forum and to trade union colleagues. All current

accreditations, such as disability and gender equality are being checked to ensure post-Vesting statutory reporting on gender pay gap for example. Tier 2 and tier 3 appointments are taking place imminently following Members equalities training. In addition, Health and Safety training and guidance will be added to the online training portal, TLC as well as Be Safe for risk management. Loan worker protection device contracts will be merged and remain an option for elected Members as well as for staff to raise an alarm in an emergency situation. Information is currently being collated about the H&S function in each of the districts (whether centralised in the district or service specific) to enable assessment of future need, with further training.

- Wellbeing and Ways of Working – Work is being undertaken with Public Health on a Staff Volunteering Policy, Substance Misuse Policy as well as the Health and Wellbeing Survey to be rolled out to NHS organisations and care providers. In addition, there early conversations with providers regarding gym memberships and other benefits. Work is also being done with Property Services looking at the provision of office space including possible surplus desks and chairs, with links to the Medium Term Financial Plan (MTFP). Work is also considering at a car-parking offer to staff to look for some equity from 1 April for all employees, and the subsequent impact on culture, morale and motivation from an unequal offer. A Councillor asked for such discussions which raise an engaged response, to be brought to Committee.
- Employee Cost of Living Support – There are now a small number of designated desks that staff can confidentially book to guarantee an office workspace if employees are struggling with household heating bills. These 'warm desks; are being well used.
- Organisational Development – All districts are now on the learning management system provided by government, with an upturn in non-mandatory training which has broadly been well-received by staff. An Employee Support Toolkit is being written to include guidance on wellbeing, resilience, interview training, CV writing and other skills. The 30-day consultation on the new organisation structure has now closed whereby all staff were invited to comment on the proposed structure. The Chief Executive is responding to these personally. The Appointments Panel have met to agree job descriptions, salary levels, interview processes and other details, ahead of the Appointments Committees that will involve members, stakeholders and trade union reps for internal appointments. A matching process will then be undertaken where an employee can be considered for a new position where they believe their current role is a 75% or greater match. A Councillor asked if the stakeholder involvement

would be decided by the Appointments Committee. The Officer confirmed that this will be discussed at the Appointments Committee meeting on 22 December. A Councillor asked whether all recruitment would be internal. The Officer replied that following advice, the initial focus would be on internal staff to fill vacancies. The Officer stated that each Appointment Committee is not obliged to appoint. If no appointment is made, the post will go to external advertisement without delay. There is an implication of later start dates with external appointments. In this situation, an acting up arrangement would be likely, filled by an officer due to leave, to allow tier 3 recruitment and a team to be built.

- All districts will be paid via SAP by the end of December. All vacancies (districts and SCC) are now on single platform. Temporary labour contract has been awarded and will be operational for SCC from January 2023 and training for District managers will take place ahead of April.
- There was discussion about the concerns around delays to the culture work. Work is still to be completed on pay grade systems with early conversations with trade unions taking place.
- The Chair acknowledged the extreme workload and the commitment of staff. It was also acknowledged that LGR presents many opportunities for service improvement.
- A Councillor asked for recognition of the new Armed Forces Covenant and questioned whether this new legal duty will be taken into full consideration. The Chair confirmed this would be fully considered.
- The Chair wished for the Committee's sincere thanks to be passed to workforce colleagues who have been working on policies, strategies and other work.
- The Chair thanked all present for attending.

19. Any other urgent items of business

There were no items of urgent business.

All Councillors wished to record thanks to all staff in their commitment to the additional work of LGR.

Meeting closed at 3.32pm

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Somerset County Council

Human Resources Committee

– 24th January 2023

Somerset Council Employment Policies for Approval

Executive Member: Cllr Liz Leyshon, Deputy Leader and Lead Member on Finance and Human Resources

Lead Officer: Chris Squire, HR&OD Director

Authors: Sarah Welland – Service Manager HR Policy & Projects & Sari Brice, Strategic Manager - HR Practice

Contact Details: 01823 359822 sarah.welland@somerset.gov.uk

<i>Please complete sign off boxes below prior to submission to Community Governance</i>			
	Seen by:	Name	Date
Report Sign off	Legal	Tom Woodhams	06/01/2023
	Corporate Finance	Jason Vaughan	06/01/2023
	Human Resources	Chris Squire	
	Executive Member	Liz Leyshon	07/01/2023
	Monitoring Officer	Scott Wooldridge	
Summary:	This report provides details of the policy for the new Somerset Council which is ready for sharing with HR Committee for information purposes only. As agreed previously at HR Committee, policies meeting certain criteria (these are detailed below) would be presented to this Committee for consideration and approval, or for information only, where appropriate. Other policies would be approved via delegated authority to the Director of Customers, Digital & Workforce.		
Recommendation:	<p>The members of the HR Policy Committee are asked to:</p> <p>Note for information purposes only, the new policy listed below, which falls into the category of being a change to one or more of the District Council’s existing policies, but no significant change to the existing SCC policy.</p>		
Reasons for Recommendations:	To ensure that a pre-agreed list of key employment policies are in place for the new Somerset Council on 1 st April 2023.		
Links to Priorities and Impact on Service Plans:	Part of the People Workstream for Local Government Reorganisation.		

<p>Financial, Legal and HR Implications:</p>	<p>Financial – there are a handful of employment policies that have clear financial implications. As previously agreed therefore, any employment policies that have potential financial implications are being brought to HR Committee.</p> <p>HR – one clear set of employment policies, terms and conditions for new and existing staff. The new policies will apply to transferring staff where such policies are not contractual (i.e., have not been incorporated into the contracts of employment) and so do not fall within the protection provided under the Transfer of Undertakings Protection of Employment (TUPE) Regulations. Having a single set of HR policies will greatly assist line managers and staff and help define the organisation’s culture and values regarding our workforce.</p> <p>Legal – Where a contract of employment transfers to a new employer by virtue of the TUPE Regulations the employee’s terms and conditions of employment are protected despite the change of employer. This can sometimes result in a workforce where several different sets of terms and conditions apply.</p> <p>Changing terms and conditions can create risks of legal challenges particularly where employees are affected who have transferred under TUPE due to the protection afforded by the TUPE Regulations. To mitigate any such risks, consultation and negotiations will be carried out with Trade Unions to seek agreement to any changes.</p>
<p>Equalities Implications:</p>	<p>The Council’s duty under Section 149 of the Equality Act 2010 is to have “due regard” to the matters set out in relation to equalities when considering and making decisions. A full Equality Impact Assessment is being completed for each of the new employment policies.</p>
<p>Risk Assessment:</p>	<p>N/A</p>
<p>Scrutiny comments / recommendation (if any):</p>	<p>N/A</p>

1 Background

- 1.1 As agreed previously by HR Committee, any employment policy which meets one or more of the criteria below would be brought to the HR Committee for approval:
- a) Where there is a significant/notable change to existing SCC policy
 - b) Something is contractual / is a term or condition
 - c) Where there is a cost implication – for example redundancy compensation scheme, sick pay, annual leave entitlement determination
 - d) Anything that the unions will not agree on/sign-off
- 1.2 It was also agreed that any significant impact to any District Council partner's existing policy is 'flagged' for the HR Committee's awareness.
- 1.3 All other policies will be approved via delegated authority, by the Director of Customers, Digital & Workforce.
- 1.4 Based on the criteria above, and highlighted in yellow on the attached summary table at Appendix 1, the policy now ready for HR Committee's information is:
- Pensions Policy & Processes

2 Options Considered

- 2.1 An alternative option would have been to have not made any changes to existing policies and with effect from 1st April 2023, to operate under five different sets of employment policies. This option was discounted, and the current approach agreed for the reasons set out in HR implications above.

3 Consultations Undertaken

- 3.1 This policy has been consulted upon informally with trade union representatives in weekly working group meetings. It has also been formally approved by the LGR JNF (Joint Negotiating Forum).

4 Implications

- 4.1 The recommendation is made to ensure that Somerset Council has a set of employment policies in place which are legally compliant, fair, affordable and consistent with the values and culture of the new Council. In the event that approval is not achieved for an employment policy, Somerset County Council's existing policy would be used post vesting day, due to SCC being the continuing authority. This is with the exception of employees who TUPE transfer in from the District Councils and for whom existing terms and conditions are protected under the TUPE Regulations.

5 Background Papers

- 5.1 Appendix 1 Summary table
Appendix 2 – Pensions Policy & Processes
- 5.2 Please note, the draft policy has various words/titles highlighted in yellow. This is because we do not yet know what titles, services, etc., will be called.

Summary Table for HR Committee January 2023

Key: **Yellow** means we have flagged for information / awareness as there is a change to one or more of the District Councils (1 policy this month)

Blue means a change to the existing previously agreed SCC policy requiring approval by HR Committee (no policies this month)

Policy	Points to Note	Suggested Approval Route
Pensions Policy & Processes	<p>This policy seeks to bring together all types of retirement into one document. This should make it easier for managers and employees in Somerset Council to find all relevant information within one place.</p> <p>One District Council required a greater reduction in earnings in order to be eligible for a flexible retirement so this is a beneficial change for these staff.</p>	<p>Flagged to HR Committee for information and awareness & a positive change to one or more District Council.</p>

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Pensions Policy and Processes

Policy Statement

Somerset Council uses the Local Government Pension Scheme (LGPS), the Teachers' Pension Scheme (TP), the National Health Service Pension Scheme (NHS) and the Nest Scheme as our qualifying workplace pension schemes. The terms and conditions of employment dictate which pension scheme a worker can join.

This policy is predominately focused on the LGPS, for information on the other pension schemes **please ask**

It covers:

- Auto enrolment
- Non-pensionable absences; e.g. unpaid leave
- Retirement
- Early retirement with an unreduced pension
- Flexible Retirement
- Ill health retirement

The LGPS is a statutory pension scheme that has regulations set out in legislation however there are certain discretions that the employer can make to enhance member's benefits, these are set out in the Council's Employer Discretions Policy (link) with Peninsula Pensions who administer the LGPS on behalf of Somerset Council.

This policy does not form part of the Somerset Council Terms and Conditions and may be subject to change.

Process

Auto-enrolment

Employers are required to put all workers who meet certain age and earnings criteria into a qualifying workplace pension scheme. Workers aged between 22 and State Pension age, who earn above the enrolment earning threshold set by the UK Government must be automatically enrolled if they are not already in a qualifying workplace scheme, see her for current threshold [Workplace pensions: Joining a workplace pension - GOV.UK \(www.gov.uk\)](https://www.gov.uk/workplace-pensions-joining-a-workplace-pension).

Workers who earn less than the earnings threshold or who are under 22 or above State Pension age will not be automatically enrolled but have the right to request to opt in to a scheme at any time.

The earnings are assessed on a monthly basis so those who earn more than 1/12th of the earning threshold in a month will be automatically enrolled, even if total earnings for the year are less than the annual amount. If the worker has more than one position, each of their positions will be assessed separately.

If the worker is employed as a teacher, they will be enrolled into the Teachers' Pension Scheme. Unless one of the following exceptions applies -

- They retired on grounds of ill health pre 1.4.97, are under age 60 and working part-time whilst still in receipt of an ill health pension
- They are a protected member on a full time contract, if they have an additional part-time contract this contract cannot be enrolled into the Teachers Pensions Scheme.

If they are a non-teaching employee, they will be enrolled into the Local Government Pension Scheme.

Somerset Council has an authorised NHS Pension Direction Order in place under section 7(2) of the Superannuation (Miscellaneous Provisions) Act 1967 entitling eligible employees / workers of Somerset Council to remain in, or re-join, the NHS Pension Scheme from their first day of employment. Eligibility is determined as part of the recruitment process where applicable (this applies to certain roles within Public Health only).

If they are paid via a fee arrangement they will be enrolled into the Nest scheme.

Pension opt out

Employees have the right to opt out if they wish. If they do this within three months of being enrolled into the Local Government, National Health Service or Teachers Pension Schemes they will receive a refund of any contributions that have been paid (with the appropriate tax adjustments). If they opt out within one month of being enrolled into the Nest Scheme they will receive a full refund.

Approximately every three years near the anniversary of the date that pensions Automatic Enrolment rules first applied (May), the Government requires employers to

re-assess their workers and re-enrol those that meet the criteria and who are not currently in a workplace pension scheme.

Also, all workers who are currently in the 50/50 section of the Local Government Pension Scheme will be re-enrolled into the main section of the scheme. These workers will be able to opt back in to the 50/50 section in the month following.

If a worker has opted out within a year of the cyclical re-enrolment date (last date 1st May 2022) then they will not be re-enrolled back into a pension scheme on this date. However, they can opt back in to the pension scheme whenever they would like.

Non pensionable absences (unpaid leave)

If the employee is a member of the Local Government Pension Scheme, they can elect to pay contributions for the unpaid leave when they return to work in order that the period of unpaid leave can be counted for pension purposes. If they elect to do this within 30 days of receipt of written communication of this option or within 30 days of returning to work the employer will pay two thirds of the cost of the lost pension. If the employee elects to do this more than 30 days after returning to work or more than 30 days after receipt of written communication, the full cost of the lost pension is borne by the employee. The contributions payable will be based on the cost of paying for the pension lost during the unpaid period. Peninsula Pensions can be contacted for further advice. [Also see the Peninsula Pensions Buying Lost Pension Factsheet {add link}.](#)

Examples of unpaid leave include participating in the purchase leave scheme, the unpaid part of additional maternity or adoption leave or shared parental leave and strike action.

Redundancy

Where a redundancy situation applies and the employee is aged 55 and over, the employee's pension is awarded automatically without reduction and the Council bears the costs of the early withdrawal of pension.

Retirement

Employees are able to decide their own retirement age within the rules of their pension scheme. Employees wishing to retire should notify their Line Manager in writing and will be required to comply with their contractual notice period.

Members of the LGPS may resign and access their pension at any time from their 55th birthday, although if 'retiring' between the ages of 55 and 65 years, there may

be an actuarial reduction in the pension benefit. Employees considering an early retirement should obtain a pension quotation (link) before making a decision.

The normal pension age for benefits that were accrued to 31st March 2014 is 65 and for benefits built up from 1st April 2014 it is the same as the State Pension age, which is also the earliest date on which an individual may draw their State Pension. An employee choosing to retire at the State Pension age will receive their LGPS benefits without reduction. Details of the State Pension age can be found on www.direct.gov.uk. If an employee chooses to draw their pension before their normal pension age their pension benefits will be reduced. The reduction will be based upon how many years before their normal pension age they are choosing to retire. Where an employee chooses to work beyond their State Pension age they may continue to make pension contributions and any additional service will be recognised for the purposes of calculating their pension. An employee is entitled to defer drawing their pension until the date of their 75th birthday at the latest.

Reductions in Pay

If, within 10 years of leaving, a member (voluntarily or compulsorily) has restricted pay, reduces their grade or moves to a position with less responsibility (other than in connection with an agreed flexible retirement), the employee can choose to use the average of any 3 consecutive years pay in the last 10 years ending on a 31st March (plus RPI from the end of the 3 year period).

Early retirement with an unreduced pension

In the interest of efficiency of the service

Applies to employees aged 55 and over where the employee receives immediate access to an unreduced pension and there will be upfront costs to the Council for the early payment of benefits. Early retirement in the 'interests of efficiency in the service' may be used in certain exceptional circumstances and each case must be justified in terms of criteria and cost. It is not a general entitlement to retire early, nor is it an alternative to or substitute for disciplinary action or positively managing capability. In cases where disability materially affects the employee's performance this policy must not be applied until every effort has been made to explore reasonable adjustments in the job, in line with the Equality Act 2010.

The authority to agree a retirement in the interests of efficiency of the service sits with **Management level**.

The criteria for considering possible early retirement in the interests of efficiency of the service of employees aged 55 and over include:

- To facilitate an internal re-organisation where redundancy does not apply, and redeployment/training options have been exhausted.

- To encourage retirement where due to no fault of the employee, the work method or job content have altered to such an extent* that they affect fundamentally their competence and it is deemed inappropriate to apply the Council's Capability Procedure.
- To allow the retirement of an employee whose failing health significantly impedes their performance in the job, and where the criteria for a retirement on the grounds of ill-health cannot be met.

*If the job content alters significantly there may be a redundancy situation and this must first be discounted.

Compassionate grounds

Requests for early retirement on compassionate grounds are rare and should be considered on a case by case basis. There are cost implications for the early release of pension benefits and therefore each case must be considered and justified. Consideration may be given to waiving the actuarial reduction in benefits, under the provision of the LGPS Regulations, but the costs must be identified in the proposal. Applications to retire on compassionate grounds will be accompanied by supporting evidence, with relevant medical evidence as appropriate, and these will not proceed for decision until such evidence has been made available.

Requests from ex-employees for access to a deferred pension will also be considered on compassionate grounds, subject to relevant evidence being made available, as above.

The authority to agree an early retirement or deferred early retirement on compassionate grounds, with or without costs, resides with a **Senior manager**.

The exceptional circumstances for an early retirement on compassionate grounds would typically include:

- any other circumstance, which may prevent the employee working for some considerable time in the future, but not sufficient to be permanent ill-health
- Caring responsibilities for a parent, spouse or child that affect their ability to work
- Terminal illness of an immediate family member

Flexible Retirement

Employees aged 55 and over who are members of the Local Government Pension Scheme (LGPS) may request payment of early retirement benefits whilst remaining in the Council's employment on reduced hours and/or a lower grade. This is subject to the approval of the **Senior Leadership Team Member and the Director of HR and OD (see the Flexible Retirement Approval form)**.

A flexible retirement is allowed at the Council's discretion. The Council will apply this discretion providing the arrangement is considered operationally viable. The reduction in salary must be at least 20% either through reducing hours and/or grade and should be permanent. This is because the combined pay and pension are subject to tax deductions, making a reduction in salary of at least 20% should avoid the total earnings being subject to a higher tax bracket. Check the income tax earnings limits using this link [Income Tax rates and Personal Allowances : Current rates and allowances - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/income-tax-rates-and-personal-allowances). The employee should remain in employment for a minimum of one year from the effective date of the flexible retirement. The employee takes all of their accrued pension at the point the flexible retirement begins. The Council will only consider deviations to the above in exceptional circumstances. Please refer to SC's Pensions Discretions Policy.

Flexible retirement does not apply to employees who are receiving a redundancy payment and early pension benefits or who are taking early retirement in the interests of efficiency of the service or on compassionate grounds.

In applying for flexible retirement both the Council and the employee have two decisions to make: whether the flexible working arrangements proposed are operationally viable and whether the flexible retirement is cost effective.

The possible outcomes are:

- Flexible working request and early retirement benefits are agreed
- Flexible working request is agreed but early retirement benefits are refused
- The flexible working request is declined, therefore flexible retirement cannot take place

The only way an individual can remain in work and draw their pension is through flexible retirement. If early retirement benefits are refused in relation to a flexible working request an employee can choose to retire from the age of 55 and accept the reduction in pension.

Points of Note

It is recommended that any flexible working request is made a minimum of three months in advance of the intended start date to take into account the timescales of the two processes that are followed. [Please see What Happens with a Flexible Retirement Request.](#)

Peninsula Pensions and [HR Admin and Payroll](#) timelines and deadlines must be taken into account when planning an effective date for any new working arrangements. For example, it is better for the employee if their new working arrangements start at the beginning of a month, otherwise commencement of pension payments will be delayed. This is because [HR Admin and Payroll](#) need figures from the final payroll

run to be able to provide the information to Peninsula Pensions to enable them to calculate the CARE pension scheme benefits, as set out in the LGPS Pension Regulations.

Payment of the lump sum is made by Peninsula Pensions and the monthly pension is administered by **HR Admin and Payroll**.

Employees retiring before their normal retirement age may suffer an actuarial reduction in their pension benefits to reflect the early payment. (Further information can be obtained from Peninsula Pensions).

Where pension benefits are reduced in accordance with actuarial tables, the Council may use its discretion to waive the actuarial reduction in accordance with the Council's flexible retirement process on the following grounds only:

- compassionate reasons
- the member has protected rights
- in exceptional cases, where the Council is satisfied there is a clear business case

There may be a cost to the Council for the payment of benefits for employees between ages 55 – 60 which will be considered when making a decision.

As an application for flexible retirement can result in a range of decisions, the employee may not wish to proceed with the new arrangements if the service is not able to approve the entire request.

If the employee wishes to make any significant changes, such as a change in role, after the flexible retirement has been affected there could be pension entitlement implications. In these circumstances, the employee should seek information from Peninsula Pensions.

On taking flexible retirement the current pension is closed. Employees reducing their hours or taking a reduction in pay will be automatically enrolled into a new pension but can opt-out (see the Peninsula Pensions website).

Employees should be aware that it cannot be guaranteed that Peninsula Pensions will be able to pay the lump sum on the day of retirement or that the first pension payment will be made at the month of retirement. This is due to the information requirements of the CARE Pension Scheme.

III Health Retirement

For a LGPS member with at least two years' continuous contributory membership in the pension scheme, an ill health retirement may be available if either:

1. there is permanent incapacity to discharge efficiently the duties of the relevant employment by reason of ill health, or,
2. the ill health condition is likely to restrict the member from undertaking gainful employment before normal retirement age

The Council must make two decisions, whether to terminate the employee's employment on the grounds of incapacity due to ill health and to determine the amount entitlement to pension. Both decisions are conditional upon the receipt of a medical certification. The medical processes should be completed prior to termination to enable the employer to decide whether or not to terminate a member's employment with an entitlement to an ill-health retirement pension. In practice therefore the two decisions need to be taken in tandem.

In the circumstances above, the LGPS provides a three tier ill-health retirement package; providing graded levels of benefit based on how likely the member is capable of gainful employment after they leave.

Tier 1 Arrangements

For a member with at least two years' continuous contributory membership in the pension scheme and no reasonable prospect of being capable of gainful employment before normal retirement age, ill health benefits in the new scheme are based on membership built up to the date of leaving plus 100% of prospective membership from leaving to normal retirement age. In other words, the pension will be based on membership as if the member had stayed in the scheme until age 65.

Tier 2 Arrangements

For a member with at least two years' continuous contributory membership in the pension scheme and unlikely to be capable of gainful employment within a reasonable period of leaving, but who may be capable of gainful employment at some date in the future before normal retirement age, ill health benefits in the new scheme are based on membership built up to leaving plus 25% of prospective membership from leaving to normal retirement age.

For Tiers 1 and 2, there are protections for existing scheme members who will be aged 45 or over on 31st March 2008, to ensure they receive no less than they would have done under the old scheme.

Ill health enhancement for part time employees falling into Tier 1 or 2 is based on the hours they are working at the date of leaving. An employee who drops their hours prior to ill health retirement, as part of a trial period to see if they are capable of

remaining in work, for example, could lose out unless the hours are increased to the previous level just before retirement. Alternatively if the Occupational Health Practitioner is able to certify that the reason for the reduction in hours is due to ill health, the ill health enhancements will be based on the hours before they were reduced.

Tier 3 Arrangements

For a member with at least two years' continuous contributory membership who is permanently incapable of their local authority employment but is judged by an Independent Registered Medical Practitioner (IRMP) to be capable of gainful employment within a reasonable period after leaving that employment will be entitled to their annual accrued benefits payable as a pension for such time as the member does not obtain gainful employment up to a maximum of three years, or until the Council stops payments following the review see Somerset Council's Pensions Discretions.

Tier 3 Definitions

'Reasonable period' means a period of three years.

'Gainful employment' means any paid employment for not fewer than 30 hours in each week for a period of not fewer than 12 months.

The 3rd tier member will be required to notify the Council when employment is found providing details, including pay, working hours and length of contract of that employment, and the Council will then stop payments if this was 'gainful employment.'

If payments have continued when gainful employment has been found, the Council has powers to recover any overpayment from the 3rd tier member.

Should the member's health subsequently deteriorate as a result of the ill health condition that gave rise to the meeting of the Tier 3 criteria, regulation 37 permits consideration of ill health retirement and the awarding of a Tier 2 pension, but such a determination has to be made within three years of the date of the Tier 3 payments ceased.

The definition of the status of a 3rd tier member whose benefits are discontinued is 'a pensioner member with deferred benefits' and as such the member can request early payment of deferred benefits on ill health grounds see the Council's Pensions Discretions.

In this situation, if the "pensioner member with deferred benefits" subsequently becomes an active member of the LGPS again, the earlier period of membership,

which resulted in ill health benefits, should not be aggregated with the later active membership.

Tier 3 Review

The Council will undertake a review when payments have been made for 18 months if payments are still continuing at that point.

At the review, the Council will ask the 3rd tier member if their circumstances have changed seeking details of working hours, pay and length of contract. If the Council decides, from the information provided that gainful employment has been obtained, the 3rd tier payments will be stopped.

The Pensions Section must be notified without delay when payments should be discontinued.

If, as a result of the Council's review, it is found that a 3rd tier member has not found gainful employment, the Council may seek a further opinion from an IRMP concerning the condition which resulted in the 3rd tier membership. The Council may select the same IRMP for the review who made the judgement for the 3rd tier decision.

The IRMP should be asked

1. whether it remains the case that gainful employment could have been obtained within a reasonable period of leaving the Council's employment and, if this is the case, the precise point at which gainful employment could be obtained or
2. if the member is judged to be incapable of undertaking gainful employment within a reasonable period but is likely to be able to obtain gainful employment before retirement age.

If the IRMP is of the opinion that the member remains capable of gainful employment within the reasonable period (see point 1 above), the Council will be able to discontinue payments at the date specified by the IRMP.

If the IRMP is of the opinion, on the basis of the ill health condition that gave rise to the initial third tier determination, that the member is judged to be incapable of undertaking gainful employment within a reasonable period but is likely to be able to obtain gainful employment before his retirement age (see point 2 above), the Council is able to reclassify the scheme member from third tier to second tier see the Council's Pensions Discretions.

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Relevant Legislation	

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SOMERSET COUNCIL DYNAMIC WORKING STRATEGY

FINAL DRAFT



Contents

1. Dynamic Working Introduction	2
2. Review	4
3. Glossary of terms (as used specifically in this strategy)	4
4. How decisions will be made	5
5. Suitability of roles and eligibility considerations	5
6. Inclusion statement	6
7. Working environment & equipment	6
8. Wellbeing and work/life balance	7
Working hours	7
Sickness and presenteeism	7
9. Line management	7
10. Performance management	7
11. Recruitment and Retention	8
12. Learning and Development	8
13. Climate	8
14. Other practicalities	8
Travel and Parking	8
Meetings	8
15. Health & safety	9
16. Contractual implications	9
17. Set-up, costs, and expenses	9
18. Tax implications	9
19. You should also consider:	9
20. Elected Members	9
21. Customers	9
22. Associated Strategies and Policies	10
Appendix A: Background data and strategy rational	11
Appendix B: Equality Impact Assessment	14
Appendix B1 - Section from Dynamic Working Strategy Appendix A	27
Appendix B2 - Culture & Behaviour Workshop Information	29
Appendix C - Ways of Working Team Charter	33

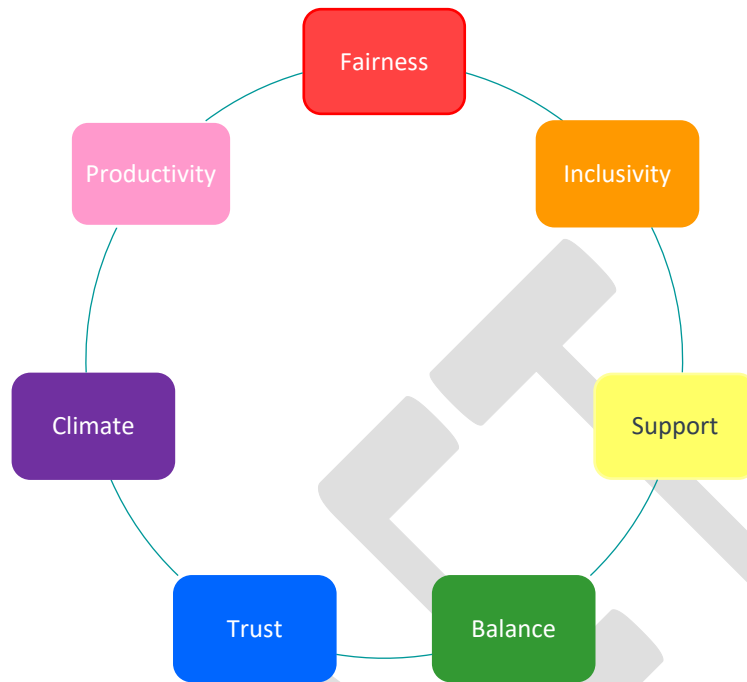
1. Dynamic Working Introduction

Somerset Council is embracing more innovative and flexible ways of working and delivering services to create a culture of trust, high performance, and wellbeing. The aim of this strategy is to support employees to create a balanced life, supporting their overall wellbeing and professional success: accepting that this will look different for different roles.

Overall, our people across all five authorities have recognised the benefits of dynamic working practices and are keen to continue working flexibly in Somerset Council. However, we must continue to listen, review, and improve how we do this to ensure everyone is supported to be happy and productive. Further information on the benefits and considerations of dynamic working can be found in Appendix A.

Therefore, it is felt that there is a strong rationale to transition to a person-based dynamic working approach allowing choice wherever possible. Key to this is the understanding that no two situations are the same with different service and role requirements, and individual circumstances to be considered.

The primary guiding principles for this strategy are:



Fairness: No employee should be disadvantaged either personally or professionally by how, where and when they work.

Inclusivity: Embracing a diverse and inclusive workforce, where no employee should be disadvantaged due to a protected characteristic and difference is valued.

Support: Every individual's specific circumstance will be considered, and they will be supported to achieve their potential.

Balance: All employees will be supported to achieve a healthy work/life balance.

Trust: All employees will be treated as trusted professionals.

Climate: Work style choices should consider, and seek to minimise, our organisational carbon footprint.

Productivity: Maximising organisational and individual productivity and effectiveness.

2. Review

- a. Regularity of strategy reviews
 - i. This strategy will be to be reviewed six-monthly for first three years, and then annually thereafter.
 - ii. A review could also be triggered by exceptional circumstances, for example, a national lockdown.
 - iii. This strategy has been developed in partnership with employees, elected members, trade unions, partner organisations and they will continue to be consulted during each review.

3. Glossary of terms (as used specifically in this strategy)

Dynamic Working	Refers to the role specific ability to flex the how, when and where you work, dependent on the role, to best meet the needs of the customers, the service, and any personal circumstances. An agreement to work dynamically is not permanent and is not a formal change to an employee's terms and conditions or contractual arrangements.
Hybrid Working	Refers to a form of flexible working where an employee spends some of their time working in the office and some time working remotely, either from home or another suitable location.
Home Working	Refers to an employee permanently spending the majority of their time working from their own home, with the agreement of the manager and with a suitable and safe workstation set up. This can be a formal contractual arrangement, but not always.
Remote Working	Refers to an employee working away from the employee's main or designated workplace, either at home or another suitable location.
Flexible Working	Refers to an employer authorising a change to the employee's contracted working hours or place of work through a flexible working request. Further details can be found in the Flexible Working Policy.
Ebb and Flow	Ebb and Flow is a way of sharing, optimising and managing workspace in the office. Under our ways of working, desk provision is on a ratio basis helping us make the most efficient use of space available and allows us to create other working spaces such as collaboration areas.
Presenteeism	Refers to an employee working whilst unwell, potentially resulting in a significant negative impact on the health and productivity of both the individual and the organisation.

4. How decisions will be made

Dynamic working arrangements are to be informally agreed and reviewed as part of ongoing dialogue between the employee and manager, allowing swift adaptability based on the needs of customers, the service, and the employee. The efficiency and effectiveness of the service will take precedence; however, employee preferences and personal circumstances, such as caring responsibilities, will be accommodated as far as reasonably possible.

Your contractual place of work remains unchanged, and it is expected that most employees will be required to work from an office location at some point, whether this is for a wellbeing reasons, a team meeting or 121, learning and development activities or a specific work task. Similarly, there may be circumstances where we ask an employee to work remotely, or from another place as we consider reasonable, when they would otherwise expect to attend work in the office, for instance:

- for operational needs, for example if there are too many employees in an office on specific days, in line with the ebb and flow model or;
- for reasons related to external circumstances, for example in the event of a lockdown/government guidance that employees should work from home, a temporary building emergency, or to enable a property refurbishment.

In all cases, employees will be given as much notice as possible.

We continue to recognise the value of in-person collaboration and connection, especially in areas such as wellbeing, learning and development, creative workshops, induction, team meetings and 121s. We will continue to encourage employees to regularly come together in-person and will provide sufficient spaces to enable this.

Team meetings will be held in person on a regular basis. Managers will hold 121s in person as appropriate and agreed. If you are asked to attend the office, there is an expectation that you will attend, but again you will be given as much notice as possible.

We are recommending that teams create a Team Charter (Appendix C); a collaboratively agreed way of working that relates specifically to their service and customer demands, flow of work and individual team members working arrangements.

5. Suitability of roles and eligibility considerations

There may be some roles within this organisation that do not support dynamic working all the time, such as fixed location workers, for example our library employees, employees on rotas such as those in customer service teams, or trade employees. However, in line with our ambition to create a more dynamic workforce, we remain open to discussing more dynamic working arrangements with any employee.

The following factors will be considered when assessing eligibility for dynamic working:

- The suitability of the role and whether the work is capable of being undertaken equally effectively from home, another location or with varying working hours.
- Whether any additional costs incurred as a result of dynamic working practices are reasonable, not including any agreed reasonable adjustments or DSE requirements.
- The suitability of the home or other remote working environment, including the technical accessibility and connectivity.
- The needs of the employee for more dynamic working arrangements.
- Any potential negative impact on the customer or service delivery.
- Any potential negative impact on colleagues or the team.
- Any potential negative impact on the employee of working from home, another remote working location or differing hours.
- The potential for maintaining good communication with the employee.
- The employee's personal risk assessment or PEEP
- The impact on data protection.

Please also note:

- Where it has been agreed that the employee can work dynamically it does not automatically mean that the employee will get the arrangement that they have requested.
- A dynamic working arrangement may not be agreed if there are performance concerns.
- A dynamic working arrangement may not be agreed if there is a training requirement and/or supervision to deliver a specific piece of work.
- To maximise the efficient use of office space, team and individual dynamic working arrangements will need to be co-ordinated, so that desk space can be shared effectively. This may mean that working patterns and arrangements have to fit around locally agreed 'ebb and flow' working.

6. Inclusion statement

Somerset Council values diversity among our workforce. We continually work to create inclusive and safe workplaces, where everyone is able to bring their whole selves to work and are valued and celebrated for their difference. By supporting dynamic working practices wherever possible, we hope to be able to attract, retain and develop a diverse, inclusive and successful workforce.

7. Working environment & equipment

In order to effectively work from home or remotely, Somerset Council will provide the employee with the appropriate equipment for the role.

Employees must take due care of any equipment provided to them. A DSE assessment will be completed by all employees, and any additional

recommended equipment will be provided, and any identified hazards will be removed.

The suitability of the working environment in terms of its technical accessibility/connectivity may impact on the employee's ability to work dynamically and may require them to work from an office base.

8. Wellbeing and work/life balance

Working hours

The health, safety and wellbeing of our employees is a top priority for Somerset Council. Whilst we appreciate there are peaks and troughs in workloads, dynamic working does not mean we expect employees to regularly work over and above their contracted hours. When working from home it can be harder to have a clear distinction between working and personal life, with the temptation to work beyond normal working hours. Employee wellbeing and a healthy work/life balance is incredibly important to us as an employer, so we support employees to balance their working days and not to work excessive hours. We encourage employees who are struggling and regularly working excessive hours to discuss this with their manager or the HR/People Function.

Dynamic working may mean that some employees choose to send messages and emails outside of regular hours. There is no expectation that the employees who receive them should reply until the next working day.

Sickness and presenteeism

When working remotely, there may be a temptation for an employee to continue to work when they should be absent due to sickness. Employees should remember that if they are too unwell to work, they should follow the Sickness Absence Policy as normal, regardless of where they may be working.

For further information please refer to supporting policies:

- Sickness Absence Policy
- Wellbeing Strategy

9. Line management

Line management responsibilities remain the same regardless of any dynamic working agreements, including managing employee performance, development, and wellbeing. Where an employee is working from home or remotely for significant periods it is recommended the line manager and employee agree mechanisms for regular communication.

Where interactions with employees is virtual, whether as a team or individual, we recommend a camera-on policy to ensure quality engagement and participation. We are also encouraging managers to work with their team to populate a Team Charter (Appendix C) to ensure everyone in the team is clear on how, when and where they are working.

The HR/People Function are available for support and guidance.

10. Performance management

All existing performance management arrangements continue to apply until a

new performance management approach is agreed, but existing arrangements should be tailored to support dynamic working. Consideration should be made about the appropriateness of the location for any performance management interactions.

11. Recruitment and Retention

Our approach to dynamic working helps to ensure that Somerset Council is an employer of choice. By allowing our employees to have more control over managing how, when and where they work, consequently enjoying a good work/life balance, whilst remaining productive and engaged in their roles, we are able to successfully recruit and retain of the best employees.

12. Learning and Development

Somerset Council are committed to the development of their employees, regardless of any dynamic working arrangements. Wherever possible training will be provided in a range of delivery options, but employees may be required to attend office sites for specific training activities and inductions.

There may be certain circumstances where more senior employees or managers need to work from office locations to provide in-person support, such as induction or supporting new or inexperienced colleagues.

We will provide training to support the transition to dynamic working, such as use of technology, line management, and managing virtual and hybrid meetings.

13. Climate

Somerset is recognised as a leader and exemplar for the Climate Emergency agenda regionally and nationally. The Dynamic Working Strategy reflects this climate agenda and as employees working for Somerset Council, we are taking individual steps to achieve net zero carbon emissions by 2030, and we understand how working dynamically contributes to this.

Reducing our energy usage and driving down our carbon footprint is a key part of our Climate Emergency carbon reduction culture, therefore Somerset Council actively encourages greener solutions to getting to work, for example car sharing, cycling, walking or using public transport where possible. In order to facilitate this, Somerset Council will aim to provide the necessary facilities, such as bike parking and shower facilities where possible.

14. Other practicalities

Travel and Parking

Travel and parking arrangements are still being discussed and remain to be confirmed.

Meetings

When deciding on the best format for a meeting we recommend that employees consider the impacts of any travel, on both time and the carbon footprint, and what format will maximise attendance or participation. Consider the nature and content of the meeting and any individual requirements, for example, accessibility needs, when agreeing the most appropriate location. In-person meetings can be

more effective when bringing a new team together or when introducing new employees to a team and may also be more suitable if the meeting contains sensitive items.

At Somerset Council we operate an all-staff **calendar open** and **camera on** (virtual attendees) approach to help us plan and hold more effective meetings.

15. Health & safety

Ensuring our employees have a safe working environment is a top priority. Therefore, we will continue to use the following tools:

- DSE Assessments
- Health & Safety risk assessments – personal and operational, including dynamic risk assessment
- Data protection and confidentiality guidelines

16. Contractual implications

This is about allowing you more freedom to manage your how, when and where you work.

Your terms and conditions, contractual working hours and agreed working pattern as noted on our HR & Payroll System will remain the same, unless a change is agreed as part of a formal flexible working request.

17. Set-up, costs, and expenses

Somerset Council cannot provide any additional financial assistance for any employee choosing to work dynamically, beyond providing basic appropriate equipment for the role any in line with any reasonable adjustments.

18. Tax implications

Please see the HMRC website for current guidance and more information.

19. You should also consider:

- b. Mortgage, lease, and insurance implications
- c. Employer access
- d. Moving home
- e. Security, data protection and confidentiality

Employees must ensure that they have the appropriate provisions in place to support their dynamic working, for example, ensuring that they are covered under their home insurance for working at home and indeed that any mortgage agreement in place supports home working.

If employees move home, please ensure you update the Employee Self Service portal in the normal way.

20. Elected Members

Our elected members fully support this approach to dynamic working.

21. Customers

Service delivery is our priority, and it is imperative that customers are not

adversely affected by dynamic working. Team agreements will be in place to make sure we are able to meet the needs of our most vulnerable customers, during the opening hours of the customer contact points. We will also work to enable more services to be available online, so those customers that can self-serve do, and are able to do it at a time and place that is convenient to them.

22. Associated Strategies and Policies

- Leave Policy
- Flexi Policy
- Sickness Absence Policy
- Lone Working Policy
- Wellbeing Strategy
- Equality and Inclusion Policy
- Learning and Development Strategy
- Climate Strategy
- Asset Strategy

Appendix A – Background data and strategy rational

Appendix B – Equality Impact Assessment

Appendix C – Team Charter

Appendix A: Background data and strategy rational

Benefits of dynamic working

Research by The Chartered Institute for Personnel and Development (CIPD) has shown that post pandemic, there has been significant interest in more flexible ways of working, and that hybrid and dynamic working options have created new employee expectations and desires. Benefits for the individual include:

- A better work–life balance
- A greater ability to focus with fewer distractions
- More time for family and friends
- Saved commuting time and parking costs
- IT upskilling and higher levels of motivation
- Higher levels of employee job satisfaction and reduced absence rates

Other broader organisational benefits include:

- Greater access to talent/improved talent pools by overcoming geographic limitations
- There is a global trend towards dynamic and hybrid working opportunities that we need to keep up with for attraction and retention.
- A reduction in commuting hours.
- Alignment with our climate emergency and green agenda
- Saving on asset expenditure and premises costs
- The ability, as an employer, to attract, support and realise the benefits of a more diverse and inclusive workforce, including those with a wide range of disabilities and caring responsibilities, but offering more flexibility

Continuously changing national guidance during the pandemic meant that we had to rapidly embrace home and hybrid working practices. Throughout this period all 5 authorities in Somerset engaged with their people to understand how these new working arrangements were working for them and what the impact was on service delivery.

Note: survey completed by majority of office-based workers.

Benefits as highlighted by our employees

- Around 85-90% of employees reported role motivation & productivity has remained the same when either home or hybrid working.
- Over 60% employees reported working at home has allowed them to better manage their wellbeing and more than half feel they have achieved a better work/life balance. Less commuting time was often given as the top reason for this.
- Over 80% of people feel they are still able to work effectively with others and a similar amount have felt their continued contact with managers has been

good.

- Consistently over 90% of employees feel levels of trust have increased due to more home and hybrid working.
- Most employees are happy about how less travel is supporting our climate change agenda.
- Over 80% of employees across all five authorities want to continue hybrid working arrangements.
- The Cultural Workshops have shown a desire to continue hybrid working to be the second most common theme.

Organisational considerations and concerns

- Communication methods and impacts – Most office-based employees report that Microsoft Teams has worked well for internal communication. However, we are aware that external communication is more challenging with no designated channel. Also, those without devices, specifically desktop computers or laptops, find it harder to connect and communicate.
- Service impact – This will have to be carefully monitored and considered as the transition to permanent dynamic working takes place. Services which require face-to-face customer interaction have remained relatively unchanged, and whilst there was disruption during the pandemic, there has largely been a return to normal working practices. However, some services are still reporting negative impact and are struggling to see how dynamic working will work for them.
- Access to office-based technology – some services require access to specific equipment, such as printers, and offices need to be set up in such a way that access is easy. Wherever possible, there must continue to be progress towards a paperless environment to support more effective hybrid working.
- Hybrid enabling technology – meeting rooms should be kitted out with appropriate technology such as video conferencing equipment, where possible, to enable hybrid meetings.
- Managing hybrid teams – managing a team's wellbeing, development and performance in a hybrid environment presents new challenges and we need to ensure that our managers are adequately trained and supported.
- Wellbeing and isolation – access to office sites and connection with colleagues must remain an easy and flexible option for all employees. Isolation and the negative impacts of extended home working were raised as top concerns in all five authorities. Some also reported a blurring of the distinction between home and work life.

Issues as highlighted by our employees

- A lack of social contact and difficulty remaining in connected with colleagues and our teams

- A loss of identity as a Council employee
- Worries about less visibility and the impact on opportunities
- Greater reliance on team meetings the cascade of important information, and where team meetings aren't happening people can be left without essential information
- A difficult home working environment, perhaps with other people in the house, caring responsibilities, inappropriate working environment, broadband issues, or welfare concerns
- The lack of commute and easy access to device can result in working excessive hours
- Physical and mental isolation
- Technological barriers, both at home and the transition between home and office

Appendix B: Equality Impact Assessment



Somerset Equality Impact Assessment

Before completing this EIA, please ensure you have read the EIA guidance notes – available from your Equality Officer

Organisation prepared for	Somerset Council		
Version	V2	Date Completed	19 December 2022

Description of what is being impact assessed

Ways of Working – Dynamic Working Strategy:

Pre Covid the Council(s) worked on an office-based basis with local arrangements in place for staff to undertake limited working from home, often no more than one or two days a week.

As part of the formation of the new Somerset Council we are moving to a more flexible way of working which may change the ratio of time some employees spend working from home and the time spent working from the office or another location.

The new Council are proposing a ‘Dynamic Working Strategy’ in which the working environment is driven by employee preference providing the organisational, service and customer need is met. This will enable us to deliver services where and when they are needed, optimise our Asset rationalisation programme and the use of our buildings, and maximise the use of technology to deliver services more efficiently and effectively.

All employees whose preference is to work in an office-based setting will be accommodated.

Evidence

What data/information have you used to assess how this policy/service might impact on protected groups? Sources such

as the [Office of National Statistics](#), [Somerset Intelligence Partnership](#), [Somerset's Joint Strategic Needs Analysis \(JSNA\)](#), Staff and/ or [area profiles](#), should be detailed here

Data held on SAP and other payroll systems - Somerset Council workforce will be an amalgamation of Somerset County Council, Mendip District Council, Sedgemoor District Council, South Somerset District Council, Somerset West and Taunton Council, and new employees. Therefore, we will predominantly be drawing on the existing workforce data of these groups. Data held by Somerset Intelligence Partnership and Data from all organisations Staff Surveys.

18.8% of residents in Somerset reported a long-term health condition or disability, and of combined workforce, approx. 6.5-7% have declared a disability.

Females represent a greater proportion of the workforce in all but one of the Councils, but this is more pronounced in Somerset County Council (72%) and Mendip (77%). Sedgemoor District Council have a higher proportion of males (59%) to females.

11% of the population of Somerset identify as unpaid Carers. Of a sample 55% of Somerset County Council workforce (excluding Schools) who answered the 2021 Staff Survey 22% of respondents indicated that they provide care for someone who has a disability, long or terminal illness.

48% of the population of Somerset live in areas classed as rural. Of a sample 55% of Somerset County Council workforce (excluding Schools) who answered the 2021 Staff Survey 32 % of respondents stated they did not live in a town or city.

Please note, not all Councils hold data for all protected characteristics. For the full data available, please see the reports attached.

We have used data from Staff Surveys to illustrate employees' views on ways of working, while a majority show a preference to work in this way there is evidence that show some staff prefer working in the office. Over 80% of employees across all 5 organisations indicate they want to continue hybrid working arrangements with over 60% reporting that working from home helps manage their wellbeing and over 50% state that hybrid working allows them to achieve a better work/life balance (see below).

Data from ongoing Behaviour & Culture Workshops (see below).

We intend to look at data about building access, desk, and parking usage at office sites across the organisations once this has been collated.

Who have you consulted with to assess possible impact on protected groups? If you have not consulted other people, please explain why?

HR Colleagues from LGR Ways of Working & Wellbeing Workstream & Cross Cutting Group - Property, FM, ICT, Customers & Partners, TU Representatives (still to be reviewed by JNF), Colleagues involved in the SCC Ways of Working Project, SCC Employment Equalities Officer,

Other workstream leads, staff bodies (Networks) are being consulted and the Strategy and EIA will be amended accordingly.

Analysis of impact on protected groups

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
Age	<p>Some older employees may be less familiar with new technology and find new ways of working more challenging.</p> <p>Younger employees are likely to have less experience of the workplace and may find remote working more difficult as new starters or during the induction period.</p> <p>Some younger employees may find it more difficult to learn through observation, form relationships and understand nuances of office etiquette virtually.</p> <p>Younger employees may not have access to their own suitable space to WFH and may be living with parents or in shared accommodation. This may also be applicable to other age groups where there are multiple occupants where finding a suitable space to WFH is difficult.</p>	☒	☐	☐
Disability	<p>Some positive outcomes for some employees with a disability where the more flexible way of working has enabled them to better manage their health through having more autonomy in where and when they are able to work.</p>	☒	☐	☐

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
	<p>Less time spent in the office or less employees attending the office may reduce the amount of time for face to face interaction and some employees with a disability may be at increased risk of social isolation due to a loss of social interaction that would normally take place in an office setting.</p> <p>Fewer numbers of staff in the office may compound existing barriers for employees with disabilities working in an office, for example there may be less people to assist employees with disabilities with PEEPs working in the office or a loss of interaction for staff with mental health issues who find these interactions beneficial.</p> <p>Consideration is required for those employees with disabilities with PEEPs in place to ensure they are not negatively impacted by any lack of staff available to assist with evacuations to ensure they have a choice about accessing the office and interacting with colleagues in their team in an office setting.</p> <p>Some employees with disabilities will require specialist equipment to work from home or the office or to ensure they can fulfil their roles from both home and the office. Likewise, some employees may struggle to carry equipment back and forth between home and office.</p> <p>Some employees with disabilities may not be physically able to move equipment or clear their desks. For example, some employees have specialist chairs. These may be employees with musculoskeletal conditions and are therefore not able to collect/move their chair to a storage area.</p> <p>Some employees with disabilities may be unable to hotdesk and will require fixed desks as a reasonable adjustment. For example, this may include employees with mobility disabilities, OCD, autism, and visual</p>			

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
	<p>impairments.</p> <p>Employees with learning difficulties may find remote working more difficult and may require more regular practical or face to face support and may also benefit from having a consistent working environment.</p> <p>Greater flexibility around office location may mean some employees with disabilities might not be familiar with buildings or layout.</p>			
Gender reassignment	<p>Due to the nature of open plan offices and teams sharing spaces employees who are transitioning or have been through gender reassignment may be working with unfamiliar colleagues which may cause anxiety/concern.</p>	☒	☐	☐
Marriage and civil partnership	<p>Partners/Spouse may not wish to work together in the same space as they live.</p>	☒	☐	☐
Pregnancy and maternity	<p>Pregnant employees may have specialist equipment such as chairs particularly in the third trimester of pregnancy & may be unable to move/collect from storage areas.</p> <p>Employees returning from maternity leave may still be breastfeeding and will need a suitable space to feed, express and store milk if working in an office.</p> <p>Introduction of Dynamic Working Strategy may allow increased choice of where pregnant employees can work where service demands allow.</p>	☒	☐	☐

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
Race and ethnicity	<p>Where an employees first language is not English there may be difficulties understanding the language used for new technology.</p> <p>Cultural differences in households may mean working together is not an option at home or there is not enough space to accommodate working from home.</p>	☒	☐	☐
Religion or belief	<p>Potential to enable greater flexibility for religious observance and customs as the dynamic way of working gives employees a greater degree of choice about where and when they work. For those with less choice and flexibility, a conversation with their manager will need to establish how this can be enabled.</p>	☐	☒	☐
Sex	<p>Disproportionate number of female employees (approx. 70 to 30) affected by the need to balance work and childcare or other caring responsibilities. Some of this might be easier to manage under dynamic working.</p> <p>Consideration of the impact on those who must work in the office or other work location more regularly to meet service delivery.</p>	☐	☐	☒
Sexual orientation	<p>While Services/Teams will be allocated desk zones in office locations these spaces will be shared so employees may be working with unfamiliar colleagues which may cause increased anxiety/concern.</p>	☒	☐	☐
Other, e.g., carers, veterans, homeless, low income, rurality/isolation, etc.	<ul style="list-style-type: none"> Carers – as with childcare, disproportionate number of females balancing work and other caring responsibilities. This is not limited to females only and many employees will share caring responsibilities and have caring responsibilities for someone other 	☒	☐	☐

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
	<p>than a child. Evidence that those working in a flexible way have been better able to manage these combined responsibilities.</p> <ul style="list-style-type: none"> • Veterans – possibility of difficulty managing the level of flexibility where a highly structured approach has been the norm. • Low income – potential for issues with space availability, costs of heating and lighting, affordability of transport to the office and this can negatively impact those staff's ability to either work from home comfortably or make it more difficult to attend a workplace. • Rurality – access to Broadband will present challenges for some. • Public transport availability may also impact those wanting to go into the office for specific meetings, but access to public transport is not available or where it is available timetables do not make this easy. • Employees designated work base is not based on location nearest to home address, some employees may have to travel further than others and incur more expense. 			

Negative outcomes action plan				
Where you have ascertained that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.				
Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
Continue to develop programme of support for new tech and WoW - There are easy to access tutorials on the ICT Training site and training on The Learning Centre or one to one support can be arranged, either by WoW or through Technology Champions.	Select date	Andrew Fisk		<input type="checkbox"/>
Onboarding process recommends that Managers ensure some work/training is face to face with new starters and their team, particularly during the induction period.	31/03/2023	Clive Mallon/Helen Thomas		<input type="checkbox"/>
Younger employees can be assigned a more experienced workplace buddy/mentor.	Select date	Manager		<input type="checkbox"/>
Setting up of a Young Persons Network.	01/11/2022	Misha Liddiatt		<input checked="" type="checkbox"/>
Younger employees who prefer to work in the office or do not have a suitable space to work from home can be accommodated in an office. Suitability of the workspace and DSE assessment as part of Induction process.	Select date	Clive Mallon/Helen Thomas		<input type="checkbox"/>
Employees with disabilities who prefer to work in the office all or some of the time can be accommodated in an office and have choice about where they work in	Select date	Manager		<input type="checkbox"/>

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
line with their needs and the service delivery need. Responsibility to ensure arrangements are suitable sit with line managers and regular reviews will need to be in place to ensure that the working arrangements are still the most effective to support wellbeing.				
Engagement with employee disability network to ensure needs are being met or where this is not active or representative will need to ensure there is clear signposting for support for reasonable adjustments.	Select date	Michelle Anderson		<input type="checkbox"/>
Where employees require a fixed desk or help with moving equipment, including specialist chairs or require more face-to-face working, it is the manager's responsibility to ensure that a suitable desk is allocated and that there are sufficient team members available to assist in the office or that a buddy has been assigned. Where lockers are considered suitable for storage, ensure lockers are nearby and easily accessible. Specialist chairs will need to be stored in the area the team is working in.	Select date	Manager		<input type="checkbox"/>
Where employees have PEEPs in place for when working in an office ensure sufficient/additional members of the team/staff are trained to undertake evacuation chair training, ensure sufficient staff attend the office and have a rota in place. If this is not possible provide a dedicated ground floor space where employees and some of their colleagues can work	Select date	Manager/Property/ FM		<input type="checkbox"/>

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
together.				
Whether duplicate specialist equipment will be required both at home and at work will be assessed on a case-by-case basis and as recommended by Employment Equalities Officer/H&S/Access to work as reasonable adjustments.	Select date	Employment EO		<input type="checkbox"/>
Ensure buildings, access, facilities, equipment is DDA compliant. Are doors automated Are lifts available as alternative to stairs Is there sufficient Accessible/Blue Badge Parking Is there clear signage Does the building have an Induction Loop System	Select date	Property		<input type="checkbox"/>
Ensure technology is DDA compliant and compatible with specialist software, ICT may need to provide additional support to ensure systems work.	Select date	ICT		<input type="checkbox"/>
Where staff have anxieties around sexual orientation or gender reassignment and working with unfamiliar colleagues Managers with the support of HR and Equalities Employment Officer can put together a support package/plan on a case-by-case basis that works for the individual for example limiting some	Select date	Manager		<input type="checkbox"/>

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
desks to immediate team only.				
Employees who prefer not to work from home and to work from an office base will be able to work in an office.	Select date	Property Services		<input type="checkbox"/>
Managers to regularly check the working arrangements are satisfactory as part of one-to-one meetings.		Manager		
Temporarily assign the same desk or match pregnant employees with other office-based employees to help with the movement of any equipment.	Select date	Manager		<input type="checkbox"/>
Managers are responsible for conducting Health and Safety risk assessments at work for pregnant employees and those who have recently given birth. Managers need to be mindful that these will need to take place both in the workplace and at home if appropriate.	Select date	Manager		<input type="checkbox"/>
Consideration will need to be given for provision for breast feeding and storage of breast milk by Property/Asset Workstream. Provision is currently available in the First Aid Room or AG18 in CH, the First Aid room in Bridgwater House, the First Aid room or private booth in Brympton Way, the Ground Floor PHN room or private booth Shape	Select date	Property/FM		<input type="checkbox"/>

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
Mendip, the Ground Floor PHN room, or First Floor Managers Office in Glastonbury Hub.				
Any provision or programme of training and support for new technology and ways of working will need to consider English may not be an employee's first language.	Select date	Andrew Fisk T&D Lead		<input type="checkbox"/>
Managers to regularly check how the working arrangements impact on caring responsibilities and whether these can be mitigated as part of one-to-one meetings.	Select date	Manager		<input type="checkbox"/>
Employees individual circumstances will require a conversation between the manager and employee to find workable solutions or to trial things with reviews.	Select date	Manager		
Those affected by poor Broadband will be able to work in the office.	Select date	Manager		<input type="checkbox"/>
What is happening with designated office review? - Staff may be able to work at the office located nearest to home address.				
If negative impacts remain, please provide an explanation below.				

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
Completed by:	Cat Tyson			
Date	16.12.22			
Signed off by:	Amanda Kotvics			
Date	21st December 2022			
Equality Lead/Manager sign off date:	Michelle Anderson 19th December 2022			
To be reviewed by: (officer name)	Cat Tyson			
Review date:	16.01.23 – Feedback from JNF held on 11.01.23 30.01.23 – Feedback from HR Policy Committee held on 24.01.23			

Appendices to EIA

Appendix B1 - Section from Dynamic Working Strategy Appendix A

Benefits as highlighted by our employees

- Around 85-90% of employees reported role motivation & productivity has remained the same when either home or hybrid working.
- Over 60% employees reported working at home has allowed them to better manage their wellbeing and more than half feel they have achieved a better work/life balance. Less commuting time was often given as the top reason for this.
- Over 80% of people feel they are still able to work effectively with others and a similar amount have felt their continued contact with managers has been good.
- Consistently over 90% of employees feel levels of trust have increased due to more home and hybrid working.
- Most employees are happy about how less travel is supporting our climate change agenda.
- Over 80% of employees across all five authorities want to continue hybrid working arrangements.
- The Cultural Workshops have shown a desire to continue hybrid working to be the second most common theme.

Organisational considerations and concerns

- Communication methods and impacts – Most office-based employees report that Microsoft Teams has worked well for internal communication. However, we are aware that external communication is more challenging with no designated channel. Also, those without devices, specifically desktop computers or laptops, find it harder to connect and communicate.
- Service impact – This will have to be carefully monitored and considered as the transition to permanent dynamic working takes place. Services which require face-to-face customer interaction have remained relatively unchanged, and whilst there was disruption during the pandemic, there has largely been a return to normal working practices. However, some services are still reporting negative impact and are struggling to see how dynamic working will work for them.
- Access to office-based technology – some services require access to specific equipment, such as printers, and offices need to be set up in such a way that access is easy. Wherever possible, there must continue to be progress towards a paperless environment to support more effective hybrid working.
- Hybrid enabling technology – meeting rooms should be kitted out with appropriate technology such as video conferencing

equipment, where possible, to enable hybrid meetings.

- Managing hybrid teams – managing a team’s wellbeing, development and performance in a hybrid environment presents new challenges and we need to ensure that our managers are adequately trained and supported.
- Wellbeing and isolation – access to office sites and connection with colleagues must remain an easy and flexible option for all employees. Isolation and the negative impacts of extended home working were raised as top concerns in all five authorities. Some also reported a blurring of the distinction between home and work life.

Issues as highlighted by our employees

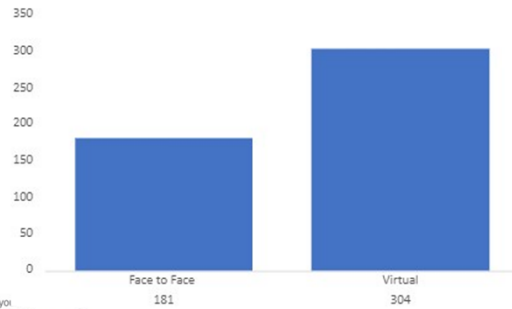
- A lack of social contact and difficulty remaining in connected with colleagues and our teams
- A loss of identity as a Council employee
- Worries about less visibility and the impact on opportunities
- Greater reliance on team meetings the cascade of important information, and where team meetings aren’t happening people can be left without essential information
- A difficult home working environment, perhaps with other people in the house, caring responsibilities, inappropriate working environment, broadband issues, or welfare concerns
- The lack of commute and easy access to device can result in working excessive hours
- Physical and mental isolation
- Technological barriers, both at home and the transition between home and office

Appendix B2 - Culture & Behaviour Workshop Information

Culture & Behaviour Workshops

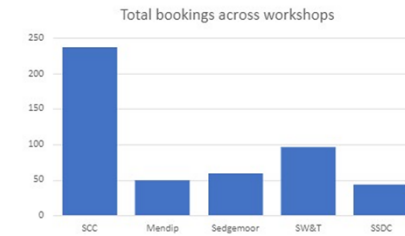
Data has been analysed for all of the Round 1 Workshops, 15 in total, 8 face to face, 7 virtual which took place during the period of April to July 2022

Workshop attendance 485 across all events

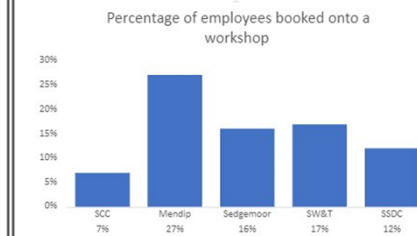


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By authority...



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Top 10 mentioned themes

(>70 mentions)



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Top 10 ranked themes (based on frequency of mentions across workshop activities).

Ref	Staff want....	Staff do not want...	Quotes	Relevant theme(s)
A - Communication	To be well informed across the whole organisation, with consistent messaging from leaders and managers – an accessible culture where expectations are clear.	To be kept in the dark, inconsistent messages or lack of clarity about structure, roles and responsibilities, misinformation or lots of jargon.	<ul style="list-style-type: none"> •“CEO messages, personable zoom meetings, feels like he cared, we mattered” •“Cross organisation communication and updates to better understand different services (...)” •“Opportunities to understand new service teams, start from scratch and get things right” •“Regular briefings and mechanisms for senior management/leadership to be available and accessible” •“Communication (capturing all staff and different methods)” •“Setting the right tone” •“Jargon – too much which confuses customers” •“Engage staff in strategy!” 	<ul style="list-style-type: none"> •Communication [1] •Clarity of roles, responsibilities, processes, teams, structure and service areas [14] •Engagement / engaged / consultation / involvement [24] •Accessible / access / accessibility [40] <p>Induction / onboarding Staff Q&As</p>
B – Dynamic working practices	A dynamic working approach, which supports effective teamworking, focuses on balance and is enabled by the right tools (e.g. policies, technology and work spaces).	Working practices which dictate how and when work should be done without consideration of personal or business need.	<ul style="list-style-type: none"> •“Flexible working inclusive for staff who have caring responsibilities and also need to work locally (...)” •“Not being flexible in how colleagues get their work done (dictating hours i.e. 9 - 5)” •“Flexible working – hours, blended working, environment, to do things differently” •“Unhealthy working hours / practices” •“Trust: work life balance - hybrid working - paperless. Improved processes enable flexibility” •“Shared accessible workspaces” •“Adopt newer technologies to help us move forwards” •“Different teams may require policies and procedures that suit the ways they work - not one size fits all e.g. social care may have a different need to communicate than economic development” 	<ul style="list-style-type: none"> •Flexible / dynamic / hybrid / agile ways of working / responsive [2] •Technology / digital / systems [26] •Working environment / space [45] <p>Policies</p>
C – Cross- team, partnership and external working	Good working relationships across teams and with partners (including Members) to understand and plan how best to support those we work for.	Disconnected services that do not interact with each other or collaborate on delivery.	<ul style="list-style-type: none"> •“Small culture in bigger teams” •“Good working relationships across other teams and agencies. ‘One’ meetings working well.” •“Outward looking and partnership working – integration, expertise of other partners” •“Holistic approach” •“Community relationships and new PCNS” •“Focus on customer care rather than just figures and performance stats” •“Officers and Members working well together” •“Bringing multiple perspectives into integration of systems” 	<ul style="list-style-type: none"> •Collaboration / working across teams and partners / collective / inclusive / connected / networking / joint working [5] •Partners / external agencies / customers / community relationships (e.g. people we work with) [8] <p>Members / political direction</p>

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Headline themes – primary focus of action with reference and headline title (A to C), what staff want and don’t want to see in new organisation and highest ranked linked theme with rank in square brackets (e.g. [1] indicating the highest mentioned theme).

Links to other data sources

Carers - [Carers - Somerset Intelligence - The home of information and insight on and for Somerset - Run by a partnership of public sector organisations](#)

Rurality - [Somerset: Facts & Figures - Somerset Intelligence - The home of information and insight on and for Somerset - Run by a partnership of public sector organisations](#)

DRAFT

Appendix C - Ways of Working Team Charter

Team:

What is our team purpose?

Where, when and how we work (*balancing everything discussed by the team with organisational and operational needs*) e.g.

- We will work fully remotely and catch up f2f once a month
- We will be fully flexible hours between 7am and 7pm
- We will have some meetings where we turn cameras off

What will we change? e.g.

- We will have a no-meeting afternoon every week
- We will look to reduce the number of meetings we have

How we support everyone in the team to work in the most productive way for them and remain fully inclusive e.g.

- We are mindful that we all work differently and will support the need for a mix of remote and f2f interactions
- We will support each other to take regular breaks away from the screen

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Dynamic Working Strategy

Author: Amanda Kotvics, Lead Specialist – People
24th January 2023

Dynamic Working Strategy

Somerset Council is embracing more innovative and flexible ways of working and delivering services to create a culture of trust, high performance and wellbeing.

Dynamic Working refers to the role specific ability to flex the how, when and where you work, to best meet the needs of the customers, the service, and any personal circumstances.

The aim of this strategy is to support employees in creating a balanced life, encouraging their overall wellbeing and professional success.



Approach

Allowing employees choice, wherever possible, about how and where they work.

An agreement to work dynamically is not permanent and is not a formal change to an employee's Ts & Cs or contractual arrangements.

We continue to recognise the value of in-person collaboration and connection, e.g., for learning and development, induction, some team meetings and managing performance.



Benefits

Employer of Choice - improving recruitment & retention.

Wellbeing – family friendly, better home and work balance.

Climate - significant potential to reduce office footprint, business & commuter travel. Supports our climate emergency agenda.

Budget - significant potential to reduce cost of estate.



Somerset County Council

Human Resources Committee

– 24th January 2023

Somerset Council Dynamic Working Strategy for Approval

Executive Member: Cllr Liz Leyshon, Deputy Leader and Lead Member on Finance and Human Resources

Lead Officer: Chris Squire, HR&OD Director

Authors: Amanda Kotvics, Lead Specialist – People

Contact Details: 01935 462270 amanda.kotvics@southsomerset.gov.uk

<i>Please complete sign off boxes below prior to submission to Community Governance</i>			
	Seen by:	Name	Date
Report Sign off	Legal	Tom Woodhams	13/01/2023
	Corporate Finance	Jason Vaughan	13/01/2023
	Human Resources	Chris Squire	12/01/2023
	Executive Member	Liz Leyshon	10/01/2023
	Monitoring Officer	Scott Wooldridge	13/01/2023
	Summary:	This report provides details of the new Dynamic Working Strategy for Somerset Council, which is ready for consideration and if appropriate, approval, by the HR Committee.	
Recommendations:	The members of the HR Policy Committee are asked to: Formally approve the new Dynamic Working Strategy, as detailed below, for use in the new Somerset Council with effect from 1st April 2023.		
Reasons for Recommendations:	To adopt new ways of working to ensure that a consistent approach to where and how people work is agreed and in place for the new Somerset Council on 1 st April 2023.		
Links to Priorities and Impact on Service Plans:	Part of the People Workstream for Local Government Reorganisation.		
Financial, Legal and HR Implications:	Financial – There are some financial implications, for example continuing to offer standard equipment to work from home. There may be additional equipment required for those who need reasonable adjustments, but this is separately budgeted for. Contracts of employment remain unchanged mitigating against increasing travel costs. Enabling a flexible approach to where people work will free up office space, which could lead to a		

	<p>rationalisation of the building estate across the County.</p> <p>HR – Having an embedded Dynamic Working Strategy will support line managers and employees and help define the organisation’s culture and values regarding our workforce. It will help with recruitment and retention and embed the aim of the new Council to be an employer of choice.</p> <p>Legal – There are no changes to terms and conditions, and a work base will continue to be on every employee’s contract of employment. The request to work in a dynamic way will be agreed with the service/line manager and is a temporary arrangement.</p>
Equalities Implications:	The Council’s duty under Section 149 of the Equality Act 2010 is to have “due regard” to the matters set out in relation to equalities when considering and making decisions. A full Equality Impact Assessment has been completed for the new Dynamic Working Strategy and is attached as an appendix to the strategy document.
Risk Assessment:	N/A
Scrutiny comments / recommendation (if any):	N/A

1 Background

- 1.1 Under Local Government Reform the five Councils have come together to agree a unified way of working for the new Council. For Somerset County Council this replaces the previous Smart Working Strategy and the Hybrid Working guidance.
- 1.2 The new way of working follows trends, best practice, and recommendations from industry experts such as the Chartered Institute of Personnel and Development and Time Wise.
- 1.3 Most employees across all five councils recognise the benefits of dynamic working practices and are keen to continue to work flexibly in the new Council. Consistently over 90% of employees feel levels of trust have increased due to more home and hybrid working. See Appendix A of the Dynamic Working Strategy for the full range of benefits and background data.

- 1.4 Some of the broader organisational benefits include:
- Greater access to talent/improved talent pools by overcoming geographic limitations
 - There is a global trend towards dynamic and hybrid working opportunities that the new Council wants to keep pace with for attraction and retention
 - A reduction in commuting hours
 - Alignment with our climate emergency and green agenda
 - Saving on asset expenditure and premises costs
 - The ability, as an employer, to attract, support and realise the benefits of a more diverse and inclusive workforce, including those with a wide range of disabilities and caring responsibilities, but offering more flexibility

2 Options Considered

- 2.1 An alternative option was to continue with hybrid working arrangements, which is a split between home and office working. Hybrid working can involve taking a more formal and rigid approach to the number of days spent in the office or at home. Each of the five councils were also using similar terms interchangeably, for example: hybrid, flexible, agile. Analysing feedback from employees and managers this option was discounted for the more flexible approach that Dynamic Working allows. Dynamic Working is not just about where employees work, but how they work. The term Dynamic Working is new and distinct from all previous strategies, policies or informal arrangements which exist in the predecessor organisations.

3 Consultations Undertaken

- 3.1 The Dynamic Working Strategy has been consulted on with key stakeholders: union representatives, HR, Property, IT, Facilities Management, Customers and Partners, colleagues involved in the SCC Ways of Working project, Employment Equalities Officers, employee networks and workstream leads. The strategy was taken to the LGR JNF (Joint Negotiating Forum) on Wednesday 11th January 2023 for formal approval.

4 Implications

- 4.1 The recommendations are made to ensure a fair and consistent approach to ways of working in the new Council. If approval is not achieved for the Dynamic Working Strategy, there is a risk to employee retention and recruitment and the reputation of Somerset Council as an employer of choice.

5 Background Papers

5.1 Dynamic Working Strategy

Appendix A – Background data and strategy rationale

Appendix B – Equality Impact Assessment

Appendix B1 – Section from Dynamic Working Strategy – Appendix A

Appendix B2 – Culture & Behaviour Workshop information

Appendix C - Team Charter