Chard Town Council
The Guildhall, Fore Street, Chard, Somerset TA20 1PP
01460 239567 www.chard.gov.uk
Mayor: Councillor Victoria Bates
Chief Executive & Town Clerk: David Bell

HR Committee

Minutes

Minutes of the HR Committee meeting held on Tuesday 10th March 2026 at 7pm in the Mayors Parlour, The Guildhall, Fore Street, Chard TA20 1PP.

Present: Councillors; A Kenton, J Kenton (chair), O'Brien (ex officio), Bates (ex officio), Baker,

Also present: Chief Executive & Town Clerk David Bell, Deputy Clerk & Operations Manager Kevin Dyer.

Confidential Draft

Section 1 Standing Items

2026/01 **Apologies for absence:**
Apologies for the following Councillors Bulmer & Shortland were unanimously accepted.

2026/02 **Declarations of interest**

No declarations were received.

2026/03 **Committee meeting minutes**
Minutes of the HR Committee held 10th December 2025 were approved with two minor changes

Unanimous
Resolved: Committee agreed the minutes of the 10th December 2025

Section 2 Confidential Items To Note

2026/04 **To resolve to exclude members of the press and public**
As certain items are expected to include the consideration of exempt information the Human Resources Committee is, therefore, recommended to resolve "That, in accordance with Section 100A(4) of the Local Government Act 1972, the public be excluded during the discussion of the matters referred to in the items 2025/06 and 2025/07 listed below, on the grounds that they involve the likely disclosure of exempt information, as defined in the respective paragraph of Part 1 of Schedule 12A of the Act, and the public interest in maintaining the exemption outweighs the public interest in disclosing the information".

Proposed: Councillor Bates Seconded: Councillor Baker

Resolved:
To exclude the press and public for the confidential matters

Section 3 Items For Decision - Confidential

2026/06 Staff Annual Leave

Committee noted there are members of senior staff who have excessive workload due to the unresolved staffing matters, and that there is an underspend of in the region of £62,000 in the current years staffing budget. Resolving this matter is the responsibility o the Chief Executive & Town Clerk.

2026/07 Training

a) Staff

Committee noted a comprehensive matrix of staff training received and accreditation achieved is underway. Through the current appraisal process further training requirements will be identified. The matrix will provide a historic and live record of all training and certificates staff have achieved and a comprehensive gap analysis of any further training required.

b)

Committee noted Councillors will be offered details of SALC , based on their experience and other sector custom specific training courses.

In addition to individual councillor specific training, 'Worknest' have been approached with a view to provide a training course that seeks to upskill in key councillor management areas.

It is anticipated this training will be provided early in the next financial year. Committee commented that the SALC course 'Council as Employer' must be undertaken by all councillors and HR committee members HR specific courses.

2026/08 Progress On the Development of Risk Assessments

Committee noted the Risk Assessmsnrt template.

2026/09 Staffing Matters

The Committee received an oral update from the Chief Executive & Town Clerk on the recruitment for a new Town Clerk along with the draft recruitment pack which included a Job description and Job Advertisement.

2026/10 Date of next meeting

It was agreed the next meeting will be scheduled for 9th April 2026.

The Chair thanked everyone for attending & the meeting concluded.

Chair: Cllr J Kenton Date:

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HR Committee

13th July 2026

Renewal and Amendment of Policies

Purpose of Report

This report is to introduce 6 new staff policies. The procedure for these areas is currently documented in the Staff Handbook (last reviewed 2023) and is provided for comparisons,

Recommendation:

Committee is asked to RESOLVE to comment on and Recommend the draft Policies to Full Council: Absence Policy, Annual Leave policy, Flexible Working, Staff Appraisal Policy, Reasonable Adjustment Policy, Probation Policy.

Background:

1. Chard Town Council currently has no distinct HR Policies relating to matters listed above.

2. However, several of the topics are included in the Staff Handbook, extracts of which are attached. The Staff Handbook may reflect normal custom and practice for the Town Council and therefore could be incorporated into distinct and bespoke Policies.

Report:

3. The Town Council is encouraged to review and update its employment policies and procedures not least as legislation and national negotiations change. For example implementation of the recent Employment Rights Act 2025 brings several key changes, which need to be reflected.

4. Changes to Council Policy may be needed regularly and therefore it is useful to review Policy and make any changes annually.

5. HR Committee is asked to review and amend as necessary the Policies highlighted above, and to Recommend those Policies to Full Council for its approval and then implementation.

6. There are number HR Policies that will be brought to HR Committee for its consideration; the list above is a snapshot of what is considered needed at this time. Clearly time needs to be available for Councillors to properly scrutinise draft policy, so at this time only a sample, few policies are brought to Committee.

7. For example, the recently appointed Town Clerk & RFO is on probation, hence a draft Probation Policy is included.

8. Committee is asked to RESOLVE to comment on and Recommend the draft Policies to Full Council: Absence Policy, Annual Leave policy, Flexible Working, Staff Appraisal Policy, Reasonable Adjustment Policy, Probation Policy.

Name: Stephen Hill
Post: Town Clerk & RFO
Date: 6 July 2026

Chard Town Council
Absence Policy

1 Introduction

The Council is committed to providing effective, high-quality service to all its customers and to optimising the contribution of all employees. As part of this aim, it is essential that all employees are committed to maximising attendance.

The Council is concerned for the wellbeing of its employees and seeks to protect their health and safety by creating a safe working environment. In return, the Council expects all employees to take reasonable care of their own health, seek medical help whenever appropriate, and to attend work when fit to do so.

The Council recognises that genuine medical grounds will occasionally result in employee absence. It is the Council's policy to treat all such sickness absence in a fair, sensitive, and consistent manner across all areas of the workforce.

The Council must balance the sensitive management of genuine individual sickness against its need to be publicly accountable for its resource allocation and, as such, cannot sustain high levels of sickness absence. Action will therefore be taken to address recurrent short-term sickness or extended periods of absence as appropriate.

It is very likely that short or long term absence from work will impact on other staff.

1.1 Aims

In order for the Council to meet its responsibilities, it will ensure that:

- It provides a supportive environment for those employees affected by ill-health;
- Managers and employees adhere to this policy and procedure; and •

Levels of sickness absence are the subject of routine monitoring.

1.2 Responsibilities

It is important that employees read and understand this document. If employees are not sure about any part of it, they should ask their line manager, who will provide the necessary clarification.

The onus for attending work on a regular basis and for reporting absence in accordance with the Council's agreed procedures rests with the employee. It is

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also an employee's responsibility to appropriately detail any periods of absence on their record of hours worked.

The responsibility for recording, monitoring, and managing absence on a day-to-day basis lies with the Town Clerk. It is therefore essential that they ensure that all employees are aware of this Policy and Procedure.

1.3 Miscellaneous

It is important that employees comply with this procedure so that:

- The Council can monitor sickness absence across the workforce and identify any intervention/support needed;
- The Council can provide assistance to individual employees where necessary; and
- Any sick pay to which the employee would otherwise be entitled is not withheld or refused.

If an employee wilfully abuses the sickness absence/payments provisions or absented themselves without permission, then this will be dealt with in accordance with the Council's disciplinary process.

Records retained in respect of sickness absence will be treated with sensitivity and confidentiality at all times, in accordance with the provisions of prevailing Data Protection legislation. The employee is entitled to access their records on request.

2 Absence Reporting

Employees who are unable to work due to illness/injury must telephone their line manager. This should be done before their expected start time or, if this is not possible, as soon as possible. Text messages or emails are not sufficient. If the employee is unable to speak to the appropriate person, then they should leave a message for their line manager to phone them back.

When reporting absent, the employee should provide some indication of: •
The nature of the absence;

- The date the injury/illness began (including weekends and holidays); •

The expected duration of the absence; and

- Whether there are any immediate work commitments that need completing/reassigning during the absence.

If the employee is unable to report themselves absent, they must arrange for someone else to do this on their behalf.

The employee must maintain contact with their line manager during any period of sickness absence lasting longer than one day, so that the line manager is aware of any progress and the expected date of return to work.

Failure to follow the sickness reporting process may lead to the absence from work being considered as unauthorised, resulting in loss of pay and possible disciplinary action.

3 Certification

3.1 Absence Period of up to Seven Days

Where the absence is for a period of up to seven days (including weekends) and not covered by a statement of fitness to work ("fit note"), the employee will be asked to complete a self-certification form on their return to work.

3.2 Absence Period Exceeding Seven Days

If the absence exceeds seven days and the employee has not already done so, they must provide medical evidence in the form of a fit note for the remainder of the absence. If the absence continues, the employee will need to ensure that the employer is always provided with a current fit note.

All fit notes must be certified by a healthcare professional who has assessed the employee's fitness for work. Healthcare professionals who are eligible to issue fit notes are doctors, nurses, occupational therapists, pharmacists and physiotherapists. The fit note should state whether or not the employee needs to see a doctor or other healthcare professional again before returning to work.

If the fit note states that the employee "may be fit for work", the employee should inform their line manager immediately. They will refer to the fit note and discuss with the employee whether there are any additional measures that may be needed to facilitate the return to work, taking into account the doctor's or healthcare professional's advice. This may take place at a Return-to-Work Interview or an Absence Review Meeting. If appropriate measures cannot be taken, the employee will remain on sick leave and their line manager will set a date to review the situation.

4 Return to Work Meetings

When the employee returns to work after any period of absence, their line manager will arrange to meet with them. This meeting will occur on the first day back or as soon as possible.

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The Return-to-Work form is shown at Appendix 1.

The purpose of the return-to-work meeting is:

- To provide an opportunity for their line manager to check that the employee is fit enough to return to work;
- To give the employee an opportunity to voice any concerns that they may have and/or to identify any domestic, welfare, or work-related problems in an appropriate forum;
- To ensure that the employee is aware of work-related matters that have occurred during their absence; and
- To complete a Sickness Declaration Form to record details of the absence for payroll/administrative purposes in addition to the return to work form.

Return to Work interviews should still be carried out following any absences that occur during any formal monitoring periods as set out below.

5 Short-Term Frequent Intermittent Absence

5.1 Absence Triggers

The Council will instigate a more formal review of attendance records and reasons for absence with an employee if there has been either (a) four episodes of absence or (b) a total of 10 working days' short-term sickness absence within any period of 12 months.

The number of days of sickness absence which consitutes the absence trigger point will be reduced pro rata for employees who work less than 5 days per week as follows:

Normal Days Worked Per Week 5	Absence Trigger – Total No. of Working Days
4	10
3	8
2	6
1	4
	2

5.2 Action When Absence Triggers are Reached

The guidance in the following sections sets out the procedure for addressing short term absence when absence triggers are reached. A flow chart to support the guidance can be found at Appendix 2.

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If an employee's level of attendance improves satisfactorily during a period of monitoring, then at the end of the monitoring period they will be informed that no further action will be taken.

There is, however, an expectation that a satisfactory level of attendance will then be sustained. If the employee's absence meets a trigger in situations where absence monitoring has recently ended or where an employee has repeatedly been subject to absence monitoring, consideration can be given to picking up the procedure at the next or most recent stage rather than starting the process from the beginning.

5.3 Stage 1 – Short-Term Absence Review Meeting

The relevant manager will arrange an absence review meeting with any employee whose absence record matches or exceeds the above criteria set out in 5.1 above. The employee will be invited in writing to attend the review meeting and notified of their right to be accompanied by a Trade Union Representative or colleague. The employee should be reminded that the aim of the meeting is to find ways to improve their attendance.

During the meeting, the manager should bring the employee's attention to their poor attendance record and the problems that their absences are causing for the Council and other employees. The manager and the employee should also consider any steps that can be put in place to help the employee to improve their attendance as well as signposting them to any additional support that can accessed such as an Employee Assist Programme.

During the meeting, if the employee discloses an underlying health condition, then the advice in section 9 should be followed.

At the meeting, the employee will normally be advised that:

- They are being issued with a Stage 1 Short-Term Absence Warning, to inform them that if they are unable to sustain an improved level of absence then this procedure will continue to be followed.
- A 6-month monitoring period will be put in place.
- During that time their absence is not expected to exceed half the annual triggers set out in 5.1 above.
- The manager will meet them at the end of the 6-month period to review their absence levels.
- If they exceed the half-year triggers before the end of the 6-month monitoring period, the review meeting should take place at this point.
- If the half-year triggers are exceeded during the monitoring period, then a decision may be taken to move to Stage 2, as set out below.

This will be confirmed in writing and the employee will be notified of their right to appeal.

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5.4 Stage 2 – Further Short-Term Absence Review Meeting

If the employee reaches the absence trigger set for their stage 1 monitoring period, the relevant manager will arrange a further absence review meeting. The employee should be reminded that the aim of the meeting is to find ways to improve their attendance. The employee will be invited in writing to attend the further review meeting and notified of their right to be accompanied by a Trade Union Representative or colleague.

During the meeting, the manager should remind the employee of the problems caused by their absences. The manager and the employee should also review any steps that may have been put in place to help the employee to improve their attendance and consider any further support that may be needed. The employee should also be reminded of any additional support that they can access such as the Employee Assist Programme.

During the meeting, if the employee discloses an underlying health condition which hasn't previously been raised then the advice in section 9 should be followed.

The employee will normally be advised that:

- They are being issued with a Stage 2 Short-Term Absence Warning, to inform them that if they are unable to sustain an improved level of absence then this procedure will continue to be followed and their employment may be terminated.
- A further 6-month monitoring period will be put in place.
- During that time their absence is not expected to exceed half the annual triggers set out in 5.1 above.
- The manager will meet them at the end of the 6-month period to review their absence levels.
- If they exceed the half-year triggers above before the end of the 6-month monitoring period, the review meeting should take place at this point.
- If the half-year triggers are exceeded during the monitoring period, then a decision may be taken to move to Stage 3, as set out below.

This will be confirmed in writing and the employee will be notified of their right to appeal.

5.5 Stage 3 – Final Short-Term Absence Review Meeting

Where an employee's attendance has still not improved to the required level, the relevant manager will arrange a final absence review meeting. The employee should be made aware that the aim of the meeting is to review and discuss their attendance and for the manager to decide whether a Short-Term Attendance Hearing should be held to consider dismissal.

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Although there is no statutory right of accompanied at this meeting, the relevant manager may extend this offer to the employee as a supportive measure.

During the meeting, the manager should review the employee's absence record and remind the employee of the problems caused by their absences. The manager and the employee should also review any steps that may have been put in place to help the employee to improve their attendance and consider any further support that may be needed. The employee should also be reminded of any additional support that they can access such as the Employee Assist Programme.

During the meeting, if the employee discloses an underlying health condition which hasn't previously been raised then the advice in section 9 should be followed.

The manager should then inform the employee whether the decision has been made to proceed to an Attendance Hearing or not. Alternative options made include a further period of monitoring or a review of the trigger levels.

5.6 Attendance Hearing for Short-Term Absence

Where the decision is made to proceed to an Attendance Hearing, the employee will be invited in writing to attend the hearing and notified of their right to be accompanied by a Trade Union Representative or colleague.

The Hearing Panel will normally be comprised of three members of the HR Committee, who will make the decision. The Town Clerk/line manager will attend to outline the history of absence; details of absence monitoring carried out; support given; and other relevant information, including, where applicable, any medical advice received.

All paperwork relating to the hearing will be circulated 5 days in advance of the hearing to all parties attending.

Once the Panel has considered the manager's and employee's cases, and all other relevant information, it will adjourn to make a decision.

The decision to terminate the employee's employment may take place where the organisation can no longer tolerate the high level of absence.

The decision of the Panel will be confirmed to the employee in writing within 5 working days. The letter should clearly set out:

1) The Panel's decision:
    a) If a stage 3 warning has been issued, the timescale for this (normally 6 months), the level of improvement required and any other measures/support put in place;

b) If the decision is to dismiss the employee, inform them of their relevant notice period and provide them with any relevant pension information; and

2) The employee's right of Appeal.

6 Long-Term Absence

All cases of long-term absence will be treated sympathetically, and every assistance will be given to the employee to return to work. There is very likely to be an impact on other staff.

6.1 Long-Term Absence Review Meetings

The Council will maintain contact with the employee and advise them that they should keep the Council informed of developments relating to their medical condition.

The Council will hold regular Absence Review Meetings with the employee during their absence, as appropriate. The purpose of the meetings is to keep the employee up to date, review the on-going absence, and offer support to the employee where appropriate.

Where an employee remains absent and a return to work is not foreseeable within a reasonable timescale, the Town Clerk will arrange a Final Absence Review meeting which may lead to an Attendance Hearing to consider dismissal.

6.2 Final Long-Term Absence Review Meeting

Prior to an absence hearing being arranged for an employee on long-term sickness absence, the Town Clerk will normally meet with the individual for a final absence review meeting.

The purpose of the meeting is to provide a final opportunity to review and discuss the employee's current situation and for the Town Clerk to decide whether an Attendance Hearing should be held. Alternative outcomes from the final absence review meeting could include seeking further medical advice or setting a date for a further absence review (e.g. where a medical appointment is due).

In order to decide whether to proceed to an Attendance Hearing, the Town Clerk will make sure that they have fully explored all the relevant information relating to the employee's absence. This would also be provided to the Attendance Hearing Panel if a decision is made to proceed to an Attendance Hearing.

This will depend upon the individual case, but may include:

- Relevant absence history and the date on which the current absence started;
- The reason for the employee's current absence;
- Details of absence review meetings and other communications during this

absence;
- Any treatment/investigations being undertaken and the timescales for these to be completed;
- Whether there has been any recent improvement in the employee's condition and whether this is expected to continue;
- Whether there is any prospect of them returning to work within a reasonable timescale;
- Any reasonable adjustments or other support which would enable the employee to return to work within a reasonable timeframe;
- Any vacant roles within the organisation which the employee would be capable of performing and, where applicable, whether they would wish for this to be considered.

It is usually advisable to seek up to date medical reports from an Occupational Health provider or the employee's medical professional prior to an Attendance Hearing.

6.3 Long-Term Absence Hearing

Where the decision is made to proceed to a Long-Term Absence Hearing, the employee will be invited in writing to attend the hearing and notified of their right to be accompanied by a Trade Union Representative or colleague.

The Hearing Panel will normally be comprised of three members of the HR Committee, who will make the decision. The Town Clerk will attend to outline the history of absence and relevant information described in Section 6.2 above.

All paperwork relating to the hearing will be circulated 5 days in advance of the hearing to all parties attending.

Once the Panel has considered the manager's and employee's cases, and all other relevant information, it will adjourn to make a decision.

The decision to terminate the employees employment may take place where: • An employee is declared permanently unfit for work;
- An employee is declared medically unfit for their work and alternative employment has not be found;
- The service can no longer support the employee's continued absence for operational/financial reasons.

The decision of the Panel will be confirmed to the employee in writing within 5 working days. The letter should clearly set out the Panel's decision:

- If the decision is not to take action at this point and to review again in a certain time period, the applicable timescale for this; or
- If the decision is to dismiss the employee, inform them of their relevant notice period and provide them with any relevant pension information; and
- The employee's right of appeal.

7 Appeals

Employees have the right to appeal against any decision to issue a formal warning or dismissal under this procedure. If an employee wishes to appeal, they should write to the Town Clerk setting out the grounds of their appeal. This must be done within 10 days of the date of the letter informing them of the outcome of the relevant stage of this procedure.

Appeals will be heard by a separate person/panel. For warnings short of dismissal, the appeal will normally be heard by another manager or the Town Clerk. For warnings issued at a Short-Term Attendance Hearing or Long-Term Absence Hearing, the Appeal will normally be heard by members of the Appeals Committee who have not previously been involved.

Once the person/panel hearing the appeal has considered both the employee's appeal and the original Hearing Chair's case, and considered all other relevant information, the meeting will be adjourned to make a decision.

The decision will be confirmed to the employee in writing within 5 working days. The decision will be final and there is no further right of appeal.

8 Occupational Health

In order to ensure that the Council has access to guidance and advice in respect of the best course of action to follow in relation to cases of absence, employees may be referred to the Council's Occupational Health Advisor.

Examples of when an employee may be referred to occupational health include to:

- establish when the employee might be able to return to work; • ask for guidance on an employee's health condition;
- discuss any adjustments that could be consider in order to support the employee.

Where the Occupational Health Advisor makes a recommendation that might affect the employee's continued employment, the relevant manager will discuss the advice and options going forward at an Absence Review Meeting with the employee. Employees may wish to have the support of a trade union representative or a work colleague present during such a meeting, and this should be positively encouraged.

In certain cases, the Occupational Health Advisor might find that an employee is unfit to perform a particular job but fit enough to undertake other types of work. In such cases, full consideration will be given to the possibility of redeployment into alternative positions. Consideration will also be given to redeployment in cases where work in a particular place poses problems with attendance.

Where a return to work following a period of prolonged absence might be

facilitated by temporary redeployment or phased re-introduction (e.g. reduction in hours) an employee can discuss these options with their manager and, if such measures are appropriate, the Council will ensure that the support mechanisms necessary for this to occur are provided. Such arrangements will be for a defined period and will be subject to joint review.

9 Underlying Medical Conditions

Where an employee and/or their manager identifies that the employee's attendance may be affected by an underlying medical condition, the Town Clerk will give consideration whether to request that an Occupational Health referral is arranged.

This process would involve discussing with the employee the proposal to undertake a referral to the Council's Occupational Health Service. The purpose of this referral would be to obtain independent medical advice on:

- The nature of any underlying/recurrent condition;
- How to support the employee to improve their attendance, e.g. suggestions for reasonable adjustments to the employee's work, which the Council could consider.

Any agreed adjustments should be taken into account when applying the following procedure, which may need to be adapted accordingly.

Where appropriate, an employee may be referred to Occupational Health on more than one occasion e.g. when there has been a change to an employee's underlying health condition or prior to an attendance hearing.

10 Personal, Domestic, or Work-Related Problems

Where an employee reveals that their absence has been a consequence of personal, domestic, or work-related problems, the relevant manager should endeavour to discuss with them any relevant details that they wish to disclose.

Although an employee may have genuine concerns about revealing sensitive or personal information, they should be reminded that such matters will be

treated confidentially and that the Council cannot assist them if it is not made aware of the problem. If an employee wishes to discuss matters with someone other than the relevant manager, the Chair of the HR Committee can be contacted for a confidential interview.

Once the problem has been clearly identified, appropriate assistance can be offered to the employee. In some circumstances, special leave, temporary adjustments in working arrangements, or referral to specialist agencies may be granted.

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11 Alcohol/Drug Dependency

Where an employee discloses that their absences are a consequence of alcohol or drug related problems, after a Risk Assessment they will be encouraged to seek help and treatment voluntarily through the Council's Occupational Health Service or through resources of their own choosing. Employees may be granted, if necessary, leave to undergo treatment and any such leave will be regarded as sick leave within the terms of the Council's sick pay scheme, with the monitoring of progress by the Occupational Health Service.

Should an employee refuse or discontinue any programme of assistance designed for them, then any unacceptable behaviour or inadequate standard of work will be dealt with on its merits through the Council's Disciplinary Procedure.

12 Welfare

If, as a consequence of medically related issues, the relevant manager has any concerns about an employee's ability to undertake the full range of duties and responsibilities associated with their post, they should encourage them to seek advice from their GP. If necessary, consideration could be given to suspending them with pay, or finding alternative duties whilst medical advice is sought from the Occupational Health Provider.

13 Monitoring of Absence Records

Monitoring is an important part of sickness absence management. In order for this to take place, it is important that all absence from the workplace is reported and recorded. All signed Sickness Declaration Forms and Return to Work Forms should be returned as soon as possible after the employee's Return to Work Interview has been conducted.

The Town Clerk will ensure that absence records are maintained for all employees. These records will provide the base data for the compilation, as required, of statistics showing the level of sickness absence across the Council.

The absence monitoring system will also enable the Town Clerk to identify individual cases where frequent or lengthy absences have occurred, or where patterns of absence have been identified. However, the manager should not rely on this as a substitute for pro-actively identifying and addressing problems or potential problems.

Managers should ensure that records of contact during and after absence are completed thoroughly and correctly stored on the employee's personnel record. These could include Sickness Absence Declaration forms, return to work meeting records, fit notes, notes of absence review meetings, correspondence and

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medical reports. These should be treated with sensitivity and confidentiality at all times. Employees will be entitled to access these records on request.

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APPENDIX 1 – RETURN TO WORK DISCUSSION

Name:				
Date of Interview:				
Time of Interview:				
Period of Sickness Absence:	From		To	
Number of Working Days Absent				

* Self Certificate / fit note provided (*delete as appropriate) – Attached

Provide brief details of the content of the discussion:

Signed …… Date……

(Employee)

Signed …… Date……

(Town/Parish Clerk)

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APPENDIX 2 – MANAGING SHORT-TERM ABSENCE – FLOW CHART

Has the employee's absence reached an absence trigger?

No. No absence review required.

Yes. Move to Stage 1.

Stage 1 – Short-Term Absence Review Meeting

Relevant manager to:

- Review and discuss absence record.
- Explain the impact and the need for attendance to improve.
- If the employee discloses an underlying health condition, then follow advice in section 9 of this policy.
- Put in place a 6-month monitoring period, with specified maximum acceptable days and episodes of absence during this time.
- Schedule the follow-up meeting to review this. State that if absence exceeds the maximum above the meeting will take place at that point.
- Confirm the above in writing.

Has absence remained within the specified maximum days and episodes during the stage 1 monitoring period?

Yes. Manager will confirm end of monitoring period.

No. Move to Stage 2.

Stage 2 – Further Short-Term Absence Review Meeting

Relevant manager to:

- Review and discuss absence record.
- Explain the impact and the need for attendance to significantly improve.
- If the employee discloses an underlying health condition, then follow advice in section 9 of this policy.
- Put in place a further 6-month monitoring period, with specified maximum acceptable days and episodes of absence during this time.
- Schedule the follow-up meeting to review this. State that if absence exceeds the maximum above the meeting will take place at that point.
- Confirm the above in writing.

Has absence remained within the specified maximum days and episodes during the stage 2 monitoring period?

Yes. Manager will confirm end of monitoring period.

No. Move to Stage 3.

Stage 3 – Final Short-Term Absence Review Meeting

Relevant manager to:

- Carry out a final review and discuss absence record.
- Consider whether to proceed to an Attendance Hearing or to implement an alternative option before holding another final absence review meeting or attendance hearing.

Short-Term Absence Attendance Hearing

- Invite employee, giving 5 working days' notice and the right to be accompanied.
- Review and discuss absence record.
- Panel will consider outcome including dismissal.
- If the panel decides to dismiss, the employee will be issued with notice of dismissal and offered the right of appeal.

Alternative options

Other outcomes could include:

- Seeking further medical advice.
- Amending the absence triggers.
- Issuing a stage 3 warning with an additional period of monitoring.

Chard Town Council
Flexible Working Policy

1. Introduction

Under provisions set out in the Employment Rights Act 1996 and regulations made under it, all employees have a statutory right to ask their employer for a change to their contractual terms and conditions of employment to work flexibly. As a good employer, ChardTown Council has always had a positive view of flexible working. This policy sets out the framework in which variable working will be managed within the Council.

2. What is Flexible Working?

Flexible working can mean a change to the number of hours worked, the times worked or the place of work.

Some examples of flexible working are:

- Part-time working;
- Homeworking or hybrid working;
- Job sharing/Flexible working hours; •

Term time only working

3. Eligibility

The right to request flexible working is available to employees from the first day of their employment.

A maximum of two flexible working requests per employee (or team, if on behalf of a team) can be made within any twelve month period. Only one request for flexible working may be live at any one time.

The legislation does not provide an automatic right to flexible working. There is an emphasis on the importance of both the employee and the employer considering the terms of the request and attempting to reach an outcome that suits both parties. The employee has a responsibility to think carefully about their desired working pattern when making an application, and the manager is required to follow a specific procedure to ensure requests are considered objectively.

4. Timescales

Requests will be considered in a timely manner. The entire process, including hearing an appeal will be completed within 2 months of the written request being received.

5. Roles and Responsibilities

Normally, the Town Clerk will consider flexible working requests and appeals will be heard by a Panel of the HR Committee.

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If the request is being made by the Town Clerk, this should be referred to the HR Committee, who will set up a panel to consider the request and a separate panel to consider any appeal.

6. Representation

Employees have the right to representation, either by a trade union representative or a work colleague, at the consultation meeting and appeal stages.

Representatives have the right to address the meeting or appeal. They may also ask questions and present the employee's case. However, they have no right to answer questions on the employee's behalf.

7. How to apply

Anyone considering flexible working should first discuss with their manager the reasons for the request to change their working pattern and how they think it could work. A formal application can then be made in writing to the Town Clerk. It should set out clearly:

- the date of the request;
- the change the employee is requesting to the terms and conditions of their employment in relation to their hours, times or place of work;
- the date the employee would like the change to come into effect;
- if and when the employee has made a previous request for flexible working to the employer.

8. Considering the Request

Each request will be considered on a case-by-case basis. Agreeing to one request will not set a precedent or create the right for another employee to be granted a similar change to their working pattern.

All requests will be carefully considered by the Town Clerk (or a Panel of the HR Committee if in relation to the Town Clerk), involving relevant managers where appropriate.

When considering a request, the Town/Parish Clerk should: •
Consider the request fairly;

- Consider the potential benefits and/or impacts that the change would have for the employee and the organisation;
- Consider any scope for compromise.

Flexible working requests will be agreed where possible. Requests may, however, be refused where there is a genuine business reason to do so.

Employers can reject an application for any of the following reasons:

- Burden of additional costs;
- Inability to reorganise work among other staff;
- Inability to recruit additional staff;
- Inability to manage performance remotely; •

Detrimental impact on quality;

- Detrimental effect on customer service;
- Detrimental impact on performance;
- Insufficient work available during the periods the employee proposes to work; or
- The proposal does not fit in with planned structural changes.

9. Consultation Meeting to Consider the Request

Where a request cannot be agreed in full without further information or discussion, the employee will be invited to a consultation meeting with the Town Clerk. The employee's Line Manager may also be asked to attend.

The purpose of this meeting will be to discuss the request, obtain additional information where needed and fully explore the benefits/impact of the requested changes. Where there are concerns that the request may not be able to be granted in full, alternative arrangements can be discussed with a view to securing some of the benefits of the application.

The employee will be given 5 working days' notice of the meeting and will have the right to representation. A written record will be made of the meeting.

10. Making the Decision

After the meeting, the Town Clerk (or Panel of the HR Committee if in relation to the Town Clerk) will consider the proposed flexible working arrangements carefully, weighing up the potential benefits to the employee and to the Council against any adverse impact of implementing the changes.

The employee will be informed in writing of the decision as soon as is reasonably practicable after the meeting. The request may be granted in full or in part: for example, the Council may propose a modified version of the request, the request may be granted on a temporary basis, or the employee may be asked to try the flexible working arrangement for a trial period. The employee will be given the right to appeal the decision if the employee's request is not upheld or is only upheld in part.

If an application is refused (in whole or in part), the employee will be notified of the reasons why the request cannot be accommodated at this time. The grounds on which a request may be refused are set out in the section above entitled 'Considering the Request'.

Regardless of whether or not an application is approved, a maximum of two flexible working requests can be made within any twelve month period. Only

one request for flexible working may be live at any one time.

11. Right of Appeal

An employee has the right of Appeal against the Council's decision. An Appeal should be submitted in writing to the Town Clerk who will arrange an Appeal meeting.

The employee will be given 5 working days' notice of the meeting and will have the right to representation. A written record will be made of the meeting.

Appeals will be heard by the Appeals Committee. Following the meeting the employee will be notified of the outcome in writing.

12. Review

If a trial period has been agreed, then the Town Clerk and the appropriate Manager will undertake this review. This is to ensure that the change in work pattern is working effectively and that there is no adverse impact on either the work of the Council or the efficient working of the team. If there appears to be a problem, a further meeting will be set up with the employee to consult them before a decision is made either to continue, to vary the working pattern further or to revert to the original working arrangement.

At the end of the review the Town Clerk will confirm in writing whether or not the change in working pattern will be made permanent. If it may not continue, notice will be given that the working pattern cannot be accommodated and will end on a specified date.

All flexible working will be reviewed periodically by management to ensure that the needs of the Council continue to be met.

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Chard Town Council
Flexible Working Policy



Employee discusses their flexible working request with their manager

Employee submits a formal application to the Town/Parish Clerk**

The entire process, including hearing an appeal must be completed within 2 months of the written request being received.

A maximum of two flexible working requests can be made within any twelve month period. Only one request for flexible working may be live at any one time.

If further information or a discussion is required, the Town/Parish Clerk holds a consultation meeting with the employee

The employee should be given 5 working days' notice of the meeting and will have the right to representation.

Request approved subject to a trial period

Request approved

Request not approved

At the end of the trial period, the Town/Parish Clerk concludes whether the trial period has been sucessful

Yes

No

Town/Parish Clerk confirms agreement in writing as soon as reasonably practicable

Town/Parish Clerk confirms agreement in writing as soon as reasonably practicable

Town/Parish Clerk to consider if there is a compromise

Yes

No

Town/Parish Clerk meets with the employee to discuss the compromise

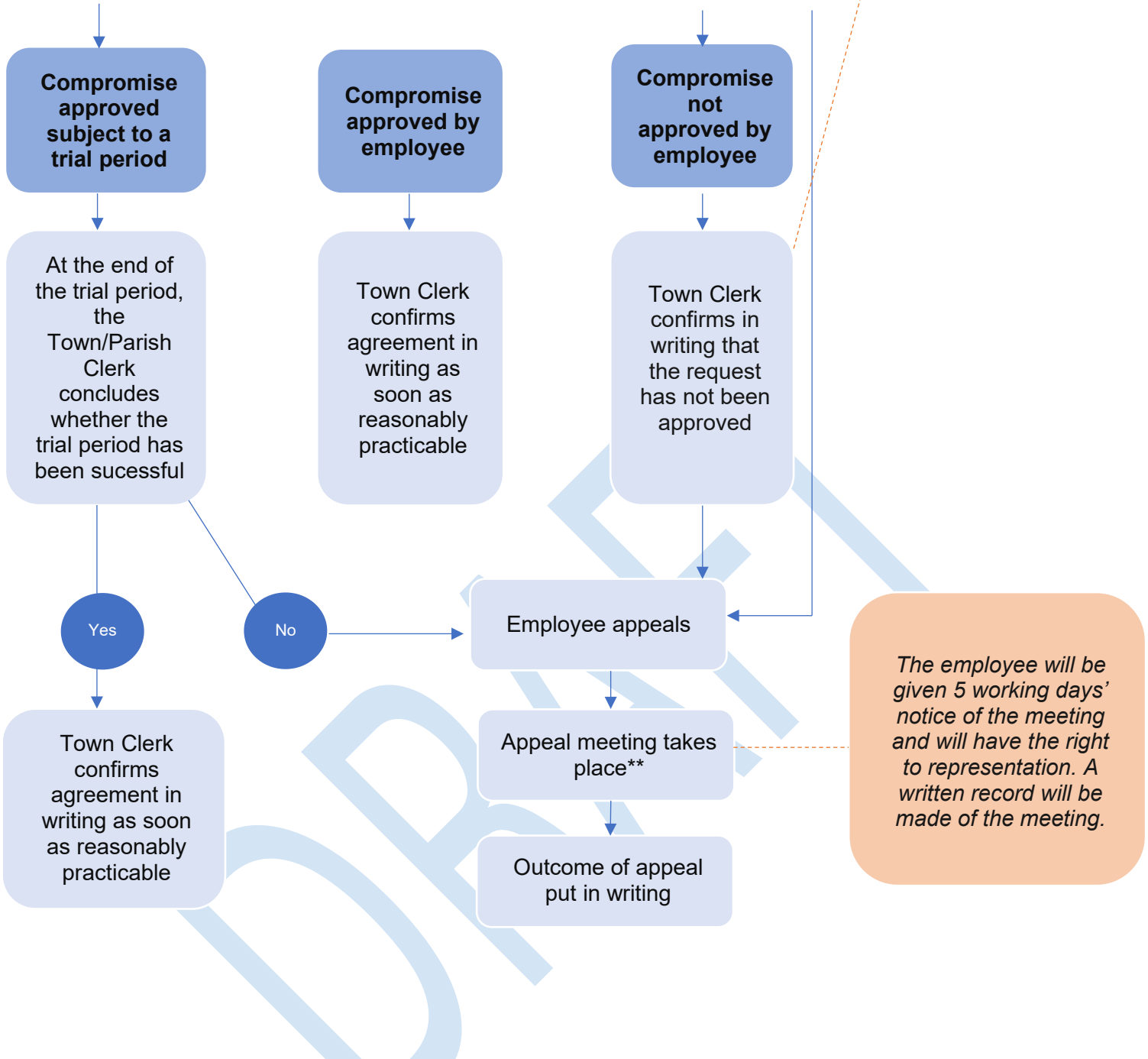
Town/Parish Clerk confirms in writing that the request has not been approved

Employers can reject an application for any of the following reasons:

- *Burden of additional costs;*
- *Inability to reorganise work among other staff;*
- *Inability to recruit additional staff;*
- *Detrimental impact on quality;*
- *Detrimental effect on customer service;*
- *Detrimental impact on performance;*
- *Insufficient work available during the periods the employee proposes to work; or*
- *The proposal does not fit in with planned structural changes.*

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Chard Town Council
Flexible Working Policy



***Normally, the Town Clerk will consider flexible working requests and appeals will be heard by a Panel of the HR Committee.*

If the request is being made by the Town Clerk, this should be referred to the HR Committee, who will set up a panel to consider the request and a separate panel to consider any appeal.

Chard Town Council
Leave Policy

1. Introduction

Chard Town Council takes a positive view on work/life balance issues and believes that employees should take responsibility for regularly taking annual leave to ensure their own health, safety, and wellbeing in accordance with the Working Time Regulations.

This policy sets out the various types of leave that employees may be entitled to. These include:

- Types of General Leave:
  - o Annual Leave, including carry over o Bank/Public Holidays
  - o Public Service o Jury Service
  - o Medical Appointments o Leave without Pay

- Types of Compassionate Leave:
  - o Compassionate Leave with Pay
  - o Statutory Parental Bereavement Leave
  - o Statutory Bereaved Partner's Paternity Leave (please refer to separate policy)

- Types of Parental/ Dependants/Carer's Leave: o Parental Leave
  - o Emergency Time Off for Dependants o Carer's Leave

Details regarding leave in relation to sickness can be found in the organisation's Absence Policy.

Details regarding other types of family friendly leave can be found in the organisation's maternity, paternity, adoption, neonatal care and parental bereavement paternity leave policies.

General Leave

2. Annual Leave

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2.1. Annual Leave Entitlement

The annual leave year runs from 1 April to 31 March.

The minimum paid annual leave entitlement is 23 days, rising to 26 days after five years' continuous service.

Those employed part-time will be entitled to leave on a pro-rata basis.

2.2. Extra Statutory Days

Employees are also entitled to two extra statutory holiday days per year; the timing of these will be decided by the organisation. Those employed part-time will be entitled to this leave on a pro-rata basis.

2.3. Office Closure

Employees are also entitled to additional annual leave when access to the Office is closed (this is usually at Christmas when during the extended Christmas break the Beehive is closed).

2.4. Joining/Leaving the Organisation

Employees who join and/or leave the organisation during the annual leave year will receive a holiday entitlement proportionate to their completed service during the leave year.

In the event of the employee leaving the organisation, payment for any leave which has been taken in excess of their accrued part year entitlement will be deducted from the final wage payment.

2.5. Annual Leave Notification Requirements

Annual leave must only be taken with Line Manager approval. Employees must give as much notice as possible when requesting annual leave. Such notice should be at least twice the number of days' leave that the employee wishes to take as annual leave.

2.6. Carry Over of Annual Leave

All annual leave should be taken in the leave year during which it is accrued. In exceptional circumstances, a maximum of five days' leave can be carried over into the next leave year with the written permission of the Town Clerk or otherwise at the Council's discretion.

3. Bank/Public Holidays

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All employees are entitled to paid bank/public holiday leave. The organisation recognises normally eight bank holidays during the calendar year, although the dates of these will vary from year to year. Bank holidays leave is in addition the Annual Leave Entitlement.

Part-time employees have a pro rata entitlement to bank/public holiday leave. This is calculated with reference to the annual entitlement of a full-time employee.

4. Public Duties

Up to 5 days' leave with pay per year may be given with the permission of the Town Clerk for serving on public bodies or undertaking public duties, e.g. magistrate's service, school governing bodies, and political appointments for those employees whose posts are not politically restricted.

Where an allowance is claimable for loss of earnings, employees should claim this. The organisation will 'top up' this amount by paying the difference between the amount of this allowance and the employee's normal contractual pay.

5. Jury Service

When on jury service, employees are required to claim an allowance for loss of earnings, which is available from the court. Chard Town Council will pay the difference between the amount of this allowance and the employee's normal contractual pay. Employees will receive a certificate of loss of earnings form along with their invitation to jury service, which the Town Clerk will arrange to complete for them in order to enable the allowance to be claimed.

Chard Town Council undertakes to make this 'top up' payment for a period of up to four weeks. If jury service is likely to extend beyond this time, consideration will be given on a case-by-case basis whether to extend the payment for an additional period.

If the employee's absence is likely to cause substantial damage to the business then the Town Clerk will discuss this with them. The employee can, if they choose to do so, ask the court to be excused, or to have their participation deferred. They are not obliged to request this, but if they do then the Town Clerk may write a letter in support of their application.

6. Medical Appointments

In general, routine medical, dental, optician or health appointments should be made outside working hours wherever possible.

Chard Town Council appreciates that it is not always possible to avoid appointments during the working day. Where this is the case, employees should make a request to their line manager to agree a convenient time, giving as much notice as possible.

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Requests will not be unreasonably refused. Employees will be required either to make up any lost time, use annual leave entitlement or take unpaid leave.

Employees who have a serious or long-term medical condition which will require appointments during their working day should discuss their situation with their manager so that appropriate arrangements may be considered.

Employees may be required to provide evidence of any appointment for which time off is needed.

7. Leave Without Pay

Additional leave without pay may be granted in special circumstances at the discretion of the Town Clerk.

8. Reserve Forces

Chard Town Council is aware that employees who are members of the Reserve Forces may be called up at any time to be used on full time operations and will be expected to attend regular training. The reserve forces include the Army Reserve, Royal Naval Reserve, Royal Marines Reserve and Royal Auxiliary Air Force.

8.1. Informing the Organisation

So that the Council can support reservists, (the organisation eg Army) must ask that employees inform the Town/Parish Clerk as soon as possible that they are, or intend to become, reservists. This requirement is put in place purely to allow us to deal with the practical implications and reservists who do this will not be disadvantaged in any way.

8.2. Time off for activities in the reserve forces:

Each leave year, reservists will normally be given 5 days' extra paid (at the discretion of the Council) leave to help them to meet their commitments to the reserve forces. The reservist should make the request to their line manager in the same way that normal annual leave is requested, tagging the request "Military reserve leave". While our organisation will do its best to accommodate any requests to use this extra leave, we cannot guarantee that reservists' extra leave requests will be given priority. To avoid reservists being unable to take time off when needed, they should apply for this extra leave as soon as possible after they are informed that they need to take time off.

This offer is available only to employees who provide evidence that they need to take the time off as a reservist (for example, a letter from their commanding officer) at the

time when they are booking holiday for the purpose of doing the reservist activities. The offer cannot be used for days when the reservist is not undertaking reservist activities (for example, to recover from the physical demands of a weekend away with the reserve forces).

8.3. Reservists' call-outs

If an employee is 'called out', the reservist should present their mobilisation papers promptly, typically together with a letter from the Ministry of Defence to the Town Clerk, outlining the date, and possible duration, of their mobilisation.

If Chard Town Council believes that the reservist's absence on military service is likely to do it "serious harm", it may apply for an exemption, deferral or revocation of mobilisation.

There is no requirement for the organisation to pay the reservist during their absence on military operations. During this period the reservist receives service pay from the Ministry of Defence, along with a standard award to make up any difference (up to the statutory limit) between their service pay and normal average weekly earnings.

Once the military service has ended, the reservist should write to the Town Clerk, to request reinstatement to employment. They should do so no later than the third Monday after demobilisation, confirming their intention to return to work within the following 13 weeks. The initial 13-week period may be renewed for a further 13 weeks if circumstances such as illness or injury prevent the reservist's return during the initial period. However, the reservist will forfeit their right to return to work if they fail to do so within 26 weeks of demobilisation.

Regardless of the length of the military action, the mobilised reservist has the right to be reinstated in their former job within six months of demobilisation, on terms and conditions that are no less favourable than those that would have been in place, but for the enforced absence.

If it is not reasonable and practicable to reinstate the reservist into their former employment, Chard Town Council will offer them the most favourable occupation on the most favourable terms and conditions which are reasonable and practicable.

Compassionate Leave

9. Compassionate Leave With Pay

Up to 3 days' compassionate leave with pay can be granted in order to help the employee to cope with the death or serious illness of a member of their immediate family. This includes their:

- Husband, wife, or partner;

- Parent;
- Child, including any adopted child; and
- Sibling

A further day may be granted for attending the funeral.

All applications for Compassionate Leave must be made to the Town Clerk for determination.

In exceptional circumstances, the Town Clerk will consider granting a maximum of a further seven days' compassionate leave in any one year.

Where eligible, employees may also wish to consider taking a period of parental bereavement leave following the loss of a child under the age of 18. Further details can be found in the Parental Bereavement Leave section below.

Where eligible, employees may also consider taking a period of unpaid Parental Bereavement Paternity Leave. Further details can be found in the Council's Parental Bereavement Paternity Leave policy.

10. Statutory Parental Bereavement Leave and Pay

Parental Bereavement Leave provides up to two weeks' leave for employees following the loss of a child who was under the age of 18 or a stillbirth after 24 weeks of pregnancy.

Where eligible, employees may also be entitled to a period of unpaid Parental Bereavement Paternity Leave. Further details can be found in the organisations Parental Bereavement Paternity Leave policy.

10.1. Parental Bereavement Leave Entitlement

In order to qualify for parental bereavement leave and pay, the employee must be either:

- the child's legal parent; or
- a parent's partner, in an enduring family relationship with the child who has passed away and their parent; or
- an individual with a caring relationship to the child, such as a "parent in fact", who are defined as a person who for a continuous period of at least four weeks before the child's death has lived with the child in the person's home, and had day to day responsibility for the child's care (provided they are not paid for that role, foster payments excepted); or
- the "intended parent" of a child who has passed away, i.e. a parent using a surrogate; or
- the "natural parent" of a child who has passed away who is named in a court order, i.e. where a court orders some contact for an adopted child's birth parent; or
- the adopter of a child who has passed away.

All employees who are eligible as above, are entitled to 2 weeks' parental leave regardless of their length of service.

The two weeks' leave can be taken either as one block or in two one-week blocks. The leave may be taken at any time within 56 weeks of the child's death.

10.2. Parental Bereavement Leave Notification Requirements

If the employee wishes the leave to start within 56 weeks of the child's death, notice must be given to the Town Clerk before the day the employee wishes the leave to start, or where that is not possible as soon as is reasonably practicable.

Employees must give the Town Clerk at least one week's notice if they wish the leave to start after the 56-day period.

When giving notice the employee must specify, ideally in writing, to the Town Clerk: • the date of the child's death,
- the date on which the employee intends the leave to start, and • whether the period of absence is for one week or two weeks.

10.3. Cancellation of Parental Bereavement Leave

If an employee has asked to begin parental bereavement leave within the first 56 days of the date of the child's death, they can cancel the parental bereavement leave, as long as they inform the Town Clerk prior to when they would have been due to start work.

If an employee has asked to begin parental bereavement leave more than 56 days after their child's death, then they can cancel their request for parental bereavement leave, as long as they inform the Town Clerk at least one week in advance.

Employees cannot cancel any week of parental bereavement leave that has already begun.

10.4. Parental Bereavement Pay Eligibility

In order to qualify for parental bereavement pay employees must meet the eligibility criteria as above and also have:

- still be employed by the organisation on the day on which the child passed away;

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- weekly average earnings over the lower earnings limit for National Insurance contributions in the eight weeks prior to the week before the child's death.

10.5. Parental Bereavement Pay Entitlement

Parental bereavement leave will be paid at the Statutory Parental Bereavement Pay (SPBP) rate or 90 per cent of the average weekly earnings, whichever is the lower.

In order to receive parental bereavement pay, an employee must notify the Town Clerk in writing within 28 days of the start of the week's (or weeks') leave or, if that is not reasonably practicable, as soon as is reasonably practicable.

Notice must include the parent's name and the date of the child's death. Furthermore, on the first occasion leave is taken, the employee must also provide a written declaration that they meet one of the qualifying conditions in terms of their relationship with the child.

Parental bereavement leave for employees who are not eligible for parental bereavement pay will be unpaid.

10.6. Continuous Service

Parental Bereavement Leave counts for the purpose of continuous service.

10.7. Returning to Work Following Parental Bereavement Leave

Employees have the right to resume working in the same job when returning to work from parental bereavement leave if the period of leave, when added to any other period of statutory leave (typically maternity leave, paternity leave, adoption leave, or shared parental leave) in relation to the same child, is 26 weeks or less.

Employees are entitled to return to an alternative job that is suitable and appropriate, rather than the same job, if:

- the period of leave taken is more than 26 weeks, when added to other statutory leave (typically maternity leave, paternity leave, adoption leave, or shared parental leave) in relation to the same child; and
- it is not reasonably practicable for them to return to the same job.

Parental Leave, Emergency Time Off Dependants and Carers Leave Options

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11. Ordinary Parental Leave

11.1. Introduction

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Ordinary parental leave applies to all parents (birth or adoptive) and those people with parental responsibilities. It allows for them to take up to a total of 18 weeks' unpaid leave for each child, using a maximum of 4 weeks per year per child. Each parent and person with parental responsibility are entitled to take this leave.

Ordinary parental leave may be particularly useful if you require time off to care for your child but have used up, or are not entitled to, other types of family-friendly leave.

Employees who are considering taking ordinary parental leave following the birth of a child or the placement of the child for adoption, should bear in mind that they may also be entitled to paid maternity / paternity / adoption / shared parental leave. Further information can be found in the organisations relevant policies.

11.2. Eligibility and notification

Ordinary parental leave is a day-one right; therefore, employees do not require any qualifying service.

The right to take up to 18 weeks' unpaid parental leave is subject to the following conditions:

- The employee must provide evidence of parenthood or parental responsibility where requested i.e. a birth certificate or adoption papers.
- The employee must give the Town Clerk at least 21 days' notice in writing to take leave. The notice must specify the dates on which the period of leave is to begin and end.
- Where an employee requests parental leave to begin when their child is born, their notice must specify the expected week of childbirth and the duration of the period of leave. The employee must give this notice to the Town Clerk at least 21 days before the expected week of childbirth. If the child is born earlier/later than expected, the employee should agree any changes to the start of the leave with the Town Clerk.
- Where the ordinary parental leave is in respect of an adopted child and is to begin on the date of the placement, the employee's notice must be given to the Town Clerk at least 21 days before the beginning of the week in which the child is to be placed for adoption, or as soon as is reasonably practicable thereafter. It must specify the week in which the placement is expected to occur and the duration of the period of ordinary parental leave requested.
- The employee can only take leave in blocks of one or more weeks except where the child is disabled, in which case it may be taken one day at a time.

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- The employees may not take more than four weeks' leave in respect of any individual child in any year. For these purposes a year is the period of 12 months beginning when the employee first becomes entitled to ordinary parental leave in respect of the child in question, and each successive period of 12 months beginning on the anniversary of that date.

The manager may postpone the leave (other than where parental leave has been requested immediately after childbirth or immediately after placement for adoption) for a maximum of 6 months if there are sound business reasons for doing so. The manager should seek agreement with the employee over mutually acceptable arrangements and confirm the outcome in writing within 7 days of the request.

If an employee falls ill during ordinary parental leave, the absence will be treated as sick leave for those periods covered by a doctor's certificate.

Managers should keep a record of leave taken under this entitlement, so that it is clear when the entitlement is exhausted.

11.3. Continuous Service

Ordinary parental leave counts for the purpose of continuous service.

11.4. Returning to work following parental leave

An employee who returns to work after a period of ordinary parental leave is entitled to return to the job in which they were employed prior to the absence if it was an isolated period of leave lasting four weeks or less.

If the period of ordinary parental leave followed on immediately from another period of statutory leave, the employee's right to return depends on the total length of leave taken.

12. Emergency Time Off for Dependants

All employees have a day-one right to take a reasonable amount of unpaid time off work to deal with particular unexpected emergencies affecting their dependants.

A dependant is:

- A spouse, civil partner, child or parent;
- A person who lives with the employee (other than as a lodger, tenant, boarder or employee);
- Any other person who would reasonably rely on the employee for assistance if they fell ill or were injured or assaulted, or who would rely on the employee to make arrangements for the provision of care in the event of illness or injury; or

- In relation to the disruption or termination of care for a dependant or any other person who reasonably relies on the employee to make arrangements for the provision of care.

Under this provision, an employee is entitled to take time off work:

- Where a dependant falls ill, gives birth, or is injured or assaulted; •

To provide assistance following the death of a dependant;

- Where there has been an unexpected disruption to, or termination of, the arrangements for the care of a dependant; and
- To deal with an emergency relating to a child of the employee that occurs unexpectedly at the child's school.

Although there is no requirement to give notice the employee must, as soon as possible, tell their line manager the reason for their absence and how long they expect to be away from work.

12.1. Pay During Emergency Time Off for a Dependant

This leave is unpaid. All employment rights, including accrual of annual leave, continue during the period of leave.

12.2. Pension During Emergency Time Off for a Dependant

Employees who are members of the Local Government Pension Scheme may 'buy back' pension lost during authorised unpaid leave, as set out in this policy. See the section entitled 'Implications of Authorised Unpaid Leave and Industrial Action for Local Government Pensionable Service.

13. Carer's Leave

13.1. Carers Leave Entitlement

All employees have a day-one entitlement to unpaid leave to give or arrange care for a 'dependant' who has:

- a physical or mental illness or injury that means they're expected to need care for more than 3 months
- a disability (as defined in the Equality Act 2010) •

care needs because of their old age

A dependant is:

- a spouse, civil partner, child or parent;
- A person who lives with the employee (other than as a lodger, tenant, boarder or employee); or
- any other person who would reasonably rely on you to provide or arrange care.

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13.2. Pay During Carer's Leave

Carer's leave is unpaid. All employment rights, including accrual of annual leave, continue during the period of leave.

13.3. How Long Employees Can Take

Employees can take up to one week of leave every 12 months. A 'week' means the length of time they usually work over 7 days. For example, if someone usually works 3 days a week, they can take 3 days of carer's leave.

They can either take a whole week off or take individual days or half days throughout the year.

If an employee needs to care for more than one person, they cannot take a week of carer's leave for each dependant. They can only take one week every 12 months. They can use the week of leave on more than one dependant.

13.4. How to Take Carer's Leave

Employees need to give their employer notice before they want their leave to start.

If the request is for half a day or a day, the notice period must be at least 3 days.
If the request is for more than one day, the notice period must be at least twice as long as the requested leave. For example, if the request is for 2 days, the notice period must be at least 4 days.

The notice period needs to be in full days, even if the request includes half day amounts.

Any request should be addressed to the Town Clerk.

Employees do not need to give evidence of their dependant's care needs.

13.5. When the Organisation Can Delay Carer's Leave

If the absence would cause serious disruption to the organisation, the employee can be asked to take the leave at a different time.

If they delay it, the employer must:

- agree another date within one month of the requested date for the leave
- put the reason for the delay and new date in writing to the employee within 7 days of the original request, and before the requested start date of the leave

13.6. Pension During Carer's Leave

Employees who are members of the Local Government Pension Scheme may 'buy back' pension lost during authorised unpaid leave, as set out in this policy. See the section entitled 'Implications of Authorised Unpaid Leave and Industrial Action for

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Local Government Pensionable Service

14. Implications of Authorised Unpaid Leave and Industrial Action for Local Government Pensionable Service

The following information relates to employees who are members of the Local Government Pension Scheme.

Relevant child-related leave in the Local Government Pension Scheme means: • ordinary maternity or adoption leave – normally the first 26 weeks
- paid additional maternity or adoption leave – normally week 27 to week 39 • paid shared parental leave
- paternity leave
- paid parental bereavement leave and • paid neonatal care leave

During a period of relevant child-related leave, the employee's pension is usually worked out using their Assumed Pensionable Pay. Assumed Pensionable Pay is a notional figure that is used to make sure their pension is not affected by the pay reduction. They would continue to build up a pension in the LGPS as if they were working normally and receiving normal pay.

Assumed Pensionable Pay does not apply during:
- **unpaid** additional maternity/adoption leave (normally from week 40 – 52) • **unpaid** shared parental leave
- **unpaid** parental bereavement leave • **unpaid** neonatal care leave
- **unpaid** carers leave
- parental leave, which is always **unpaid**
- bereaved partner's paternity leave, which is always **unpaid**

These unpaid periods of leave will not count for pension purposes unless the employee pays extra pension contributions to buy the pension they have 'lost'. The extra contributions are known as Additional Pension Contributions or APCs. If an employee elects to pay APCs to buy 'lost' pension, they must notify the Town Clerk of this in writing. If they do so within 30 days of returning to work, the cost will be split between the employee and employer.

If you are away from work for a day or more due to industrial action the period will not count for pension purposes unless you elect to pay Additional Pension Contributions to purchase the 'lost' pension. The cost of purchasing the 'lost' pension would be met fully by you unless your employer voluntarily chooses to contribute.

Employees can use the 'Buy Lost Pension Calculator' on the LGPS Member website to find out more about this option. To do so, they would need some information about the amount of pay 'lost' in the unpaid period. This can be requested from the Town Clerk.

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7. HOLIDAYS

7.1 Holiday entitlement

7.1.1 Contracts of employment set out employee holiday entitlements. Part time employees' holiday entitlement will be proportionate to their normal hours of work as stated in their contract of employment and will include a pro rata entitlement to Public Holidays. Part Time holiday entitlement will normally be described in hours rather than days.

7.1.2 If an employee joins the Council part way through a holiday year, the employee is entitled to the appropriate pro rata of leave based on the number of completed weeks of service.

7.1.3 The Council offices normally close for the period between Christmas and New Year to give employees time off with their families and friends. The Council will decide on any shutdown period each year. You will be required to use holidays for this period if the Council does close. Alternatively, you may be able to negotiate to work during this period, and should discuss this as soon as possible with your line manager.

7.1.4 Some employees may be required to work during the Christmas period to ensure service continuity. However, this will be kept to a minimum where possible.

7.1.4 If an employee joins the Council from another authority or other qualifying public body, previous service may be considered in calculating holiday entitlement.

7.2 Holiday year

7.2.1 The holiday year is between 1st April and 31st March.

7.2.2 Leave is not permitted to be carried over from one holiday year to the next unless specific permission is given by an employee's line manager. Holidays not taken will be lost unless specific permission is given.

7.2.3 Subject to permission being granted, the Council allows a maximum of up to five days holiday to be carried over in one year. Only in exceptional circumstances will this be increased. In the case of part time holiday entitlement, the equivalent number of hours will be allowed to be carried over if requested.

7.3 Public and bank holidays

7.3.1 Office based Council employees are granted all public holidays with pay. Part-time employees will receive a pro rata entitlement.

7.4 Holiday booking

7.4.1 Employees must agree any holidays in advance with their line manager and holidays will only be approved once their line manager has signed a Holiday Request Form. It should be noted that a request could be turned down if there is a consequence of the absence.

7.4.2 The Holiday Request Form should be submitted as far in advance of the requested leave date as possible to ensure that Council business and service delivery needs can be managed.

7.4.3 If a holiday request has to be refused, line managers will give as much notice of refusal as possible, along with the reasons for refusal.

7.4.4 Upon resignation/termination of employment, any outstanding annual leave should be taken prior to the effective date of departure. At the discretion of the Clerk, payment may be made in lieu of holiday entitlement (these payments will meet the requirements of Regulation 14 of the Working Time Regulations 1998).

7.4.5 If an employee leaves within a leave year and holiday has been taken in excess of any entitlement accrued up to the date of departure, a pro rata financial adjustment will be made to their final salary.

7.5 Religious holidays

7.5.1 The Council does not discriminate, but if an employee wishes to celebrate festivals outside of normal public/bank holiday entitlement, the employee is required to use their normal holiday allowance to take time off for these.

Chard Town Council
Probation Policy

1. Introduction

Chard Town Council operates probation periods for all new employees to create a supportive and positive environment which enables new employees to perform effectively during their employment.

2. Purpose

The purpose of this policy is to provide a framework which sets out how to manage the performance and conduct of new employees during their probation period.

The use of probation periods is intended as a supportive and constructive process to allow new employees to:

- understand the organisation, their team/service, their role and how these fit together.
- understand the standards and objectives required for their role.
- demonstrate their skills and abilities for the role.
- learn and adapt to their new job and working environment.

The probation period should enable the organisation to monitor the new employee's effectiveness over a reasonable time frame; to provide feedback, support, and training as appropriate to the new employee; and to help decide whether their employment should continue.

This policy should be used in conjunction with the organisation's HR Policies.

3. To Whom This Policy Applies

This policy applies to all new employees.

This policy does not form part of an employee's contract of employment, and the organisation reserves the right to amend or withdraw it at any time.

The probation process can also be used for existing employees who are promoted or transferred into a different role, as it provides a framework for monitoring and support when they take up their new role. However, if there are concerns which need to be addressed during their probation, the organisation's normal capability/disciplinary process should be followed rather than addressing these at a Probation Hearing.

This policy does not apply to Councillors, agency workers, contractors, consultants, volunteers or self-employed individuals engaged by the organisation.

4. Terms of Employment During the Probation Period

During the probation period, all the terms and conditions set out in the contract of employment will apply.

The exception to this is the organisation's disciplinary and capability policies. During the probation period, neither of these policies will apply. Any capability or conduct issues will be addressed and dealt with in accordance with the probation process set out below.

5. Length of the Probation Period

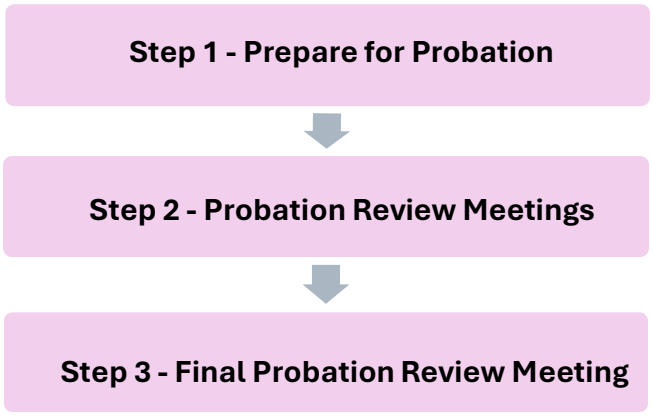
The length of an employee's probation period is specified in their contract of employment and will reflect the requirements of the role. Unless otherwise stated, the probation period will normally be four months.

This may be extended where appropriate to give an additional short period to establish whether they have met the required standards and/or to enable management processes to be followed.

The organisation reserves the right to terminate employment at any time during the probation period. This may occur, for example, where there is sufficient evidence that the required standards of performance or conduct are not being met and are unlikely to be met, or where allegations of serious misconduct have arisen.

6. The Probation Process

The probation process is normally split into three key steps, as follows:



A more detailed Flow Chart for the Probation Process is shown in Appendix C. This also shows the process to be followed at/after Step 3, depending on whether the required standards have been fully met, nearly met or not met.

6.1. Step 1 - Preparation for Probation

Before the New Employee Starts

Prior to the new employee starting in post, the Town Clerk / relevant line manager should review the role to determine the standards and objectives that the employee will be expected to meet during their probation period.

They should also consider what training and support may be needed to help them to achieve the expected standards and objectives, and ensure that this is provided from the start of the probation period. The level of support required is likely to differ depending upon the individual employee.

At this stage, where possible, the Town Clerk / relevant line manager should also schedule dates for all probation review meetings, including the Final Probation Review Meeting. These meetings will normally take place at the end of month 1, at the end of month 2, the end of month 3 and by the end of month 4. The meeting by the end of month 4 will be the Final Probation Review Meeting.

The timings of the probation review meetings can be flexible, taking into account business needs, annual leave, sickness absence etc. However, they should be planned to ensure that the Final Probation Review takes place before the end of the four month probation period.

Initial Meeting When the Employee Starts

The Town Clerk / relevant line manager should meet with the employee early in their probation period. During the initial meeting they should:

- clearly set out the standards and objectives that the new employee will be expected to meet within their probation period.
- set out the training and support that is planned to enable them to succeed in the role.
- ask the employee whether they have any health conditions, disabilities, or aspects of neurodivergence they wish to disclose, so that appropriate adjustments or support can be considered. If so, discuss what support may be needed and whether involving other colleagues would be helpful in providing this support.
- confirm dates of all probation review meetings.

Where an employee has a disability, the Town Clerk / relevant line manager must discuss with them what support and/or adjustments are needed in order to enable them to perform their role effectively. Reasonable adjustments must be put in place. Where necessary, advice can be sought by carrying out an Occupational Health referral.

6.2. Step 2 – Probation Review Meetings

Probation Review Meetings should be held regularly during the probation period, and at least at the end of month 1, at the end of month 2 and the end of month 3. These will be followed by the Final Probation Review Meeting, which must be held by the end of month 4, as set out in the following section.

The purpose of these meetings is to assess and review the employee's progress and performance against the standards and objectives set during the initial meeting, and to provide support and guidance where improvement is required.

The Town Clerk / relevant line manager should record notes using the Probation

Review Form – Appendix A at each probation review meeting, ideally noting the employee's progress in relation to each standard and objective set, and any actions agreed. A copy of the forms should be retained by both the employee and the Town Clerk / relevant line manager.

6.3. Step 3 – Final Probation Review Meeting

By the end of month 4, the Town Clerk / relevant line manager should hold a Final Probation Review Meeting.

The purpose of the meeting should be to carry out a final review of the employee's conduct, performance, progress and suitability.

The Town Clerk / relevant line manager should again record notes using the Probation Review Form – Appendix A.

However, at the end of this meeting they should **also** complete the Final Probation Review Meeting Record - Appendix B to confirm their view as to whether or not the employee's performance and conduct have been satisfactory.

If performance and conduct are satisfactory – see Section 7

If performance and/or conduct are unsatisfactory – see Section 8

If more time is needed to assess whether or not performance and/or conduct are satisfactory – see Section 9.

7. If Performance and Conduct are Satisfactory

If, by the end of the meeting, it is concluded that the employee's performance and conduct are satisfactory, the Town Clerk / relevant line manager will:

- Complete the Probation Review and Final Probation Review Forms - Appendix A and B.
- Confirm during the meeting that the employee has successfully completed their probation and their appointment is confirmed.
- Write to the employee following the meeting to confirm the above.

8. If Performance and/or Conduct are Unsatisfactory

If, by the end of the meeting, the Town Clerk / relevant line manager's view is that the employee's performance and/or conduct during their probation has been unsatisfactory then they will:

- Complete the Probation Review and Final Probation Review Forms - Appendix A and B.
- Inform them that they will be invited to a Probation Hearing in order to consider whether or not to continue their employment.
- Inform them that their probation period is being extended until the date of the

Probation Hearing.

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- Write to the employee to confirm the extension and invite them to the Probation Hearing without delay, in accordance with section 10. The hearing should normally take place within one week of the Final Probation Review Meeting.

9. If More Time is Needed to Assess Whether or Not Performance and/or Conduct are Satisfactory

By the end of the meeting, the Town Clerk / relevant line manager's view may be that more time is needed to assess whether or not the employee will be able to meet the required standards of performance and conduct.

Other than in exceptional circumstances, there should only be a single additional review period of up to one month. [For simplicity, the guidance below assumes a one month period.]

Circumstances when a probation period may be extended include, but are not limited to:

- when the organisation considers that an extension may lead to the necessary improvement, or
- where circumstances have not enabled performance to be adequately assessed, or
- where the new employee or line manager has been absent from the workplace for an extended period during the probation period.

In such circumstances, at the end of the meeting, the Town Clerk / relevant line manager will:

- Complete the Probation Review and Final Probation Review Forms - Appendix A and B.
- Inform the employee that their probation is being extended for an additional one month period.
- Set out the objectives to be achieved and/or standards that they will need to meet during this time in order to successfully complete their probation.
- Agree any support, for example further training, that will be provided and plan any additional review meetings to check progress, where relevant.
- Explain that at the end of the one month period a Probation Hearing will take place. The purpose of this will be to decide whether the employee's performance and conduct meet the required standards, and:
    - o if they have met the standards, they will be confirmed in post.

- o if they have not met the standards by this point, a further extension is unlikely, and a decision may be taken to terminate their employment and issue them with the required notice.

Following the Final Probation Review meeting, Town Clerk / relevant line manager will write to the employee to confirm the above points and invite them to the Probation Hearing on a date at the end of the one month period, in accordance with section 10.

Any additional review meetings during the one month review period should be recorded using the Probation Review Form – Appendix A.

10. Probation Hearing

The purpose of a Probation Hearing is to discuss the employee's performance and/or conduct within their probation period and consider whether or not to continue their employment.

Examples of when a probation hearing may take place include:

- Where serious misconduct/poor performance has taken place at any point during the employee's probation, calling into question whether their employment should continue.
- Where the employee's performance/conduct has not been considered satisfactory at their Final Probation Review Meeting and a final decision is required whether or not to continue their employment.
- Where the employee's probation has been extended for one month, at the end of which a review is needed to decide whether or not they have met the required standards and can be confirmed in post.

10.1. Arranging the Probation Hearing

The Town Clerk / relevant line manager should write to the employee to confirm the Probation Hearing arrangements. The letter should:

- Explain that the purpose of the hearing is to discuss performance/conduct during the probation period.
- Give brief details of the areas of concern.
- Where relevant, include any evidence which shows that the employee's performance has fallen short of an acceptable standard and/or that conduct has been unsatisfactory.
- Inform them that they can, if they wish, be accompanied to the hearing by a work colleague or trade union representative.
- Set out that a possible outcome of this meeting could include dismissal.

The employee should be given reasonable notice of the meeting (ideally at least 5 working days) in writing.

The Town Clerk / relevant line manager may need to seek approval or request participation in this final meeting from the HR Committee, so that the meeting is conducted by someone with authority to decide on all the possible outcomes, including dismissal.

10.2. Conducting the Probation Hearing

The Town Clerk / relevant line manager usually be the deciding officer at the Probation Hearing.

If the above is not the employee's line manager, the line manager will also attend in order to provide information to those making the decision. A note-taker may also be present if needed.

During the hearing, the Town Clerk / relevant line manager will:

1. Outline the purpose of the hearing.

2. Consider the evidence/feedback about the employee's performance and conduct in relation to the objectives and standards required, including the areas of concern.

3. Give the employee the opportunity to discuss their performance and/or conduct and make any other comments, before a decision is made.

Requests for an adjournment can be made by the employee or the Town Clerk / relevant line manager. It is up to the deciding officer to decide whether or not a request should be granted.

10.3. Outcome of the Probation Hearing

The outcome of the hearing may be a decision to do one of the following:

- Confirm that the employee has successfully completed their probation.
- Terminate their employment.
- Extend their probation and schedule another Probation Hearing at the end of this time, as per section 10.4.

The decision outcome from the Probation Hearing should be confirmed to the employee verbally on the day of the hearing. It must also be confirmed in writing, wherever possible within 5 working days of the hearing.

10.4. Extended Probation Period Agreed

Other than in exceptional circumstances, a decision to extend the probation period is not appropriate where it has already been extended beyond the employee's original four month probation period.

In any situation where a decision is reached at the hearing to extend the probation period further, the Town Clerk should ensure that this allows sufficient time to complete the process (including the extended probation period, another Probation Hearing and, in case they are unable to meet the required standards, the employee's notice period) within six months of the employee's start date.

Where an extension is decided upon, the Town Clerk should:

- Explain that the employee's probation will be extended for a further period (up to one month, as long as timescales allow), during which they will be expected to demonstrate that they have met the required standards of performance and conduct.
- Agree any support, for example further training, that will be provided during the extended period of probation and plan any additional review meetings to check progress.
- Explain that a date will be set for another Probation Hearing at the end of the one month review period.
- Explain that the purpose of the next Probation Hearing will be to decide whether during the period of extension the employee's performance and conduct meet the required standards and:
    - o if they have met the standards, they will be confirmed in post.
    - o if they have not met the standards by this point, a further extension is unlikely, and a decision may be taken to terminate their employment and issue them with the required notice.

When confirming in writing that this is the outcome of the Probation Hearing, the Town Clerk will communicate the above points and also invite the employee to another Probation Hearing on a date at the end of the one month period.

Any additional review meetings during the one month review period should be recorded using the Probation Review Form – Appendix A.

11. Representation

Employees have the right to representation at a Probation Hearing either by a trade union representative or a work colleague.

Representatives have the right to address the hearing. They may also ask questions and present the employee's case. However, they have no right to answer questions on the employee's behalf.

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12. Dealing with Concerns and Minor Misconduct

If problem areas arise at any stage of the probation period, the Town Clerk / relevant line manager should raise these concerns promptly, providing constructive feedback and guidance to the employee, and not wait until the next formal probation review meeting to do this.

The Town Clerk / relevant line manager will normally consider minor misconduct issues and resolve them, where possible, without recourse to the formal probation procedure.

However, where allegations of more serious misconduct have arisen or where a previous warning has been given but the required improvement has not been made, this should immediately be referred to Town Clerk and may result in a decision to hold a Probation Hearing before the end of the probation period.

13. Probation Process for the Town Clerk

The probation process for the Town Clerk shall follow the procedure set out in this policy. The planning, initial meeting and Probation Review Meetings will normally be carried out by the Chairman and Deputy Chairman or two members of the HR Committee.

Where a Probation Hearing is required, the decision will be made by a panel of 3 members of the HR Committee. The Chairman and Deputy Chairman or two members of the HR Committee who carried out the Probation Review Meetings should also be in attendance, either as part of the panel or to present the case.

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Appendix A

PROBATION REVIEW MEETING RECORD To be completed at all probation review meetings

Job holders Name:	
Job Title:	
Line Manager:	
Date appointed:	
Date of review meeting:	
Stage of probation: e.g. 1/2/3 month, final review, extension period	

Work Objectives	Please give a brief narrative assessment against each, noting how well it is being achieved

Skills	Please give a brief narrative assessment of each skill relevant to the role

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- Is any further information/development needed?

- Are there any health conditions, disabilities or aspects of neurodivergence which the employee has disclosed or now wishes to disclose in order for adjustments/support to be considered? If so, what are these and what has been put in place or planned as a result.

Attendance (Total sickness absence taken during the probation period)

days

Has attendance (including time-keeping) met the requirements during the probation period? YES ☐ NO ☐ If no give reasons below

Induction (Delete / Amend as appropriate)

- Have all the required induction sessions been arranged and has the Jobholder attended all of them?

Jobholder's comments

Record any comments you wish to make regarding your performance during the probation period to date. This may include comments on factors that you feel may have affected your performance or attendance and any training that you think may benefit you.

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Town/ Line Manager comments

Please comment briefly on the Jobholder's performance during the probation to date, indicating areas where improvement is required and any training needed. You can record here other relevant information, such as factors which have affected performance and any skills and knowledge which are not being used in the Jobholder's current post. Indicating areas where improvement is required and any training/support that is required.

Planned date of next review:	

Jobholder's signature		Date	

Town Clerk / Line manager's signature		Date	

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APPENDIX B

FINAL PROBATION REVIEW MEETING RECORD

At the Final Probation Review Meeting, complete this form in addition to the Probation Review Meeting Record

Indicate below the outcome of the Final Probation Review Meeting:

confirm the new employee's appointment.

- extend the probation period by one month and set up a Probation Hearing to take place at the end of the extended one month review period. (See note below*).
- invite to a Probation Hearing to consider whether or not to continue employment. This should take place within one week of today's Final Probation Review Meeting. (See note below*).

*NOTE: For the 2nd and 3rd options above, the probation end date is hereby extended until the date of the Probation Hearing.

Town Clerk / Line Manager comments Please provide details for outcome given:

Jobholder's comments

Record any comments you wish to make. This may include comments on feedback, guidance and training, or any special factors that may have affected your performance or attendance.

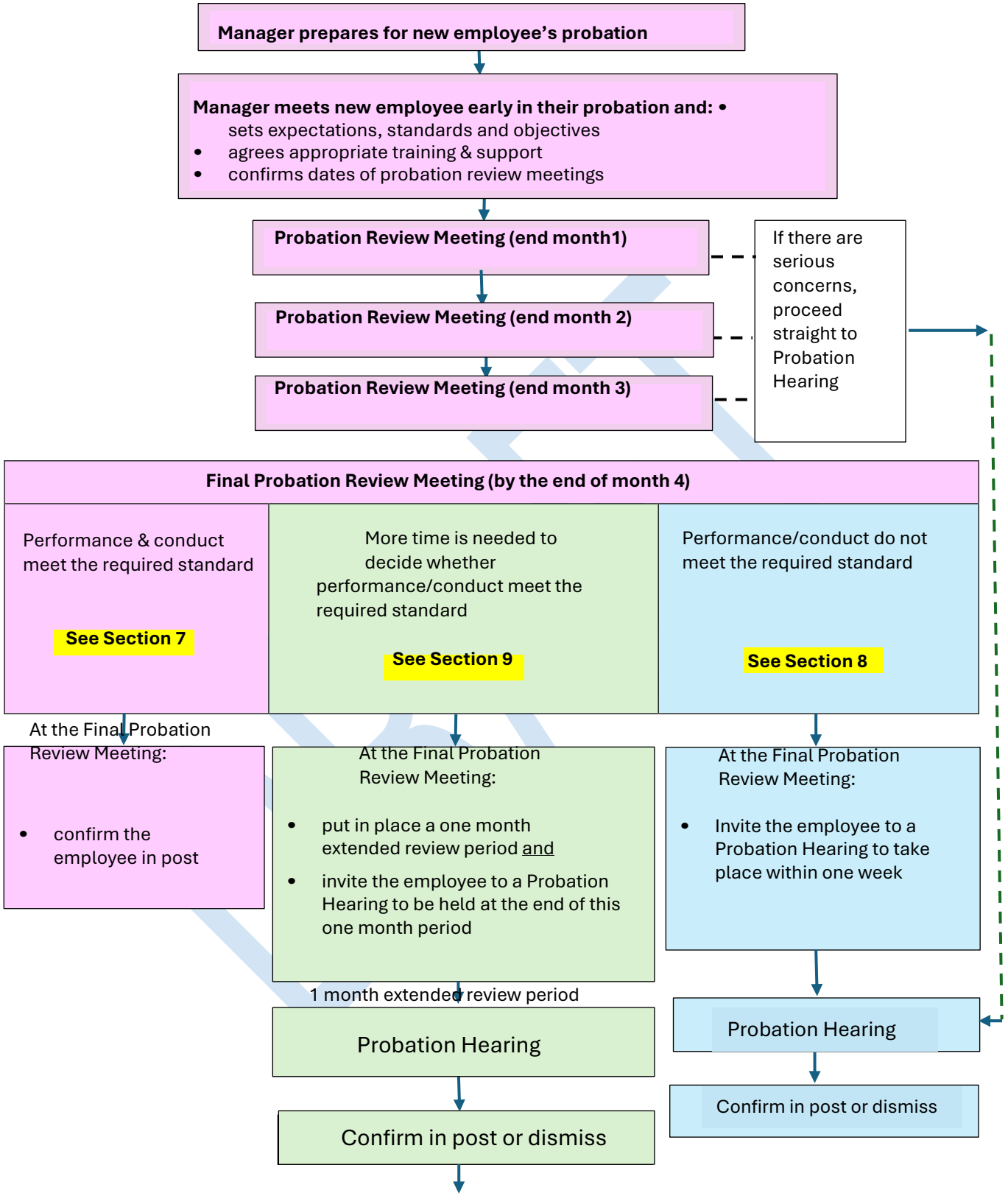
Your signature is to confirm that the Final Probation Review Meeting has taken place and that you have read and understood the record. Jobholder's signature		Date	

Town Clerk/ Line manager's signature		Date	

When the probation record has been completed a copy should be sent to the Town / Parish Clerk

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Appendix C **Probation Process Flowchart**



Full details of the process to be followed are set out in the relevant sections of this policy as shown above.

5. JOINING THE COUNCIL

5.1 Probationary period

5.1.1 Employees will normally serve a six-month probation period upon joining the Council. Where this is not the case, it will be identified within individual contracts of employment. This period is used for line mangers to assess an employee's ability to fit their role, and it is also an opportune time for new employees to consider whether they like working for the Council.

5.1.2 If an employee cannot demonstrate suitability for the role during their probation period, their employment could be terminated at any time during the probation period with the contractual notice given. The Council also reserves the right to extend the probationary period where appropriate.

5.2 Induction

5.2.1 The Council will offer every new employee relevant assistance to allow them to promptly settle into their role.

5.2.2 The new employee induction programme sets out what employees should expect during their first few weeks and months of their employment, such as meeting new colleagues and receiving relevant policies and procedures, see Addendum 1.

5.2.3 If a new employee feels they are missing some vital information for their role, they should ask their line manager.

5.2.4 The initial induction will be undertaken either by the line manager or the Clerk or both. This will include familiarisation with the Council's Health & Safety policy, relevant risk assessments, IT, and any other information relevant to the position.

5.3 Personal details

5.3.1 All employees should ensure that information on their personnel records is complete, correct and up to date, especially for cases of emergency. Line managers should be advised if any changes need to be made by way of submitting a Change to Personal Details Form.

5.3.2 Employee personal information is confidential and will not be released to any third parties without prior authorisation.

5.3.3 The Clerk maintains personnel files for all employees, which are held securely and will be kept in accordance with the Council's Document Retention Policy.

5.4 Secondary employment

5.4.1 Working for the Council is expected to be an employee's primary employment. However, the Council accepts that other working opportunities may arise, but these should not have any effect on an employee's role at the Council.

5.4.2 Employees need to request permission in writing from the Council before agreeing to any other paid employment. The Council will not unreasonably prevent additional paid employment. In making the decision with Council will consider the total hours worked with both positions and any potential impact on performance at the Council as the primary employer.

5.4.3 Employees are required to notify the Clerk in writing of any changes in working hours at their second job before accepting them in order that a review can be undertaken as o the impact on the work for the Council.

5.4.4 The Council also reserves the right to require that any other employment the employee takes on does not conflict with the role or standards required to be undertaken or met in the public office of the post.

5.5 Disclosure and barring service

5.5.1 Certain roles at the Council will require employees to undergo a Disclosure and Barring Service (DBS) check. This will be discussed with relevant employees during the interview stage or when changes require a DBS check.

Chard Town Council
Reasonable Adjustments Policy

1. Introduction

Chard Town Council is committed to promoting equality, diversity and inclusion for all our employees and for everyone who uses our services. This includes taking positive action to support individuals experiencing physical and mental health challenges.

This policy does not form part of an employee's contract of employment, and the organisation reserves the right to amend it at any time.

This policy should be used in conjunction with the organisation's other relevant policies including the Absence Management Policy.

2. The Law

2.1. Definition of a Disability

Under the Equality Act 2010, a person is considered to be disabled if they have a physical or mental impairment that has a 'substantial' and 'long-term' impact on their ability to carry out day-to-day activities.

'Substantial' is more than minor or trivial e.g. it takes much longer than it usually would to complete a daily task like getting dressed.

'Long-term' means the impairment must last for at least 12 months or has been diagnosed as likely to last for at least 12 months e.g. a breathing condition that develops as a result of a lung infection, or its likely to last for the rest of their life.

'Day-to-day activities' includes anything someone would normally be able to do if they did not have a health condition e.g. getting dressed, shopping, reading or writing.

Mental health can affect how individuals think, feel and behave and can:

- happen suddenly, because of a specific event in someone's life •

build up gradually over time

- be hard to spot because everyone has different signs and signals

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- be hidden because many people find it difficult to talk about their mental health
- fluctuate over time which means that an employee's ability to cope with the demands of the job might change

2.2. Definition of Reasonable Adjustments

Reasonable adjustments are changes that an employer makes to remove or reduce a disadvantage related to someone's disability. Reasonable adjustments are specific to an individual person. They can be for physical or mental health conditions. They can cover any area of work (see section 4.4).

2.3. Employers' responsibilities

The Equality Act 2010 says that employers must make reasonable adjustments for:

- employees and workers
- contractors and self-employed people hired to personally do the work •

job applicants

The Equality Act 2010 also says that employers are required to make reasonable adjustments when:

- they know, or could reasonably be expected to know, someone is disabled
- a disabled staff member or job applicant asks for adjustments
- someone who's disabled is having difficulty with any part of their job
- someone's absence record, sickness record or delay in returning to work is because of, or linked to, their disability

Employers must also:

- make reasonable adjustments for anything linked to someone's disability
- make sure other people do what's needed for a reasonable adjustment to work.

Chard Town Council is aware that not all physical and mental health conditions will be classed as a disability. Where the condition does not constitute a disability, the employer is not legally required to make reasonable adjustments.

However, Chard Town Council is committed to creating a work environment that supports the wellbeing of its employees and as such it aims to consider

requests for support from all employees experiencing physical and mental health challenges.

3. Examples of Reasonable Adjustments

Reasonable adjustments are specific to an individual person. However, they can cover:

- changes to someone's physical working environment e.g. changing someone's work base, allowing someone to work from home to manage distractions or engage in activities that allow them to manage their mental health or relocating someone's workspace to a quieter area to reduce sensory demands
- changing someone's working arrangements e.g. changing someone's working pattern or contracted hours
- finding a different way to do something e.g. giving someone more time to undertake a piece of work or test during an interview, providing accessible formats
- providing equipment, services or support e.g. providing adapted equipment such as chairs or phones.
- changing someone's roles and responsibilities (and hence salary) e.g. reviewing tasks or deadlines to help someone have a reasonable workload while managing their mental health or breaking down work into short term tasks to reduce the complexity of someone's work and to provide structure to the working day
- reviewing working relationships and communication styles e.g. agreeing a preferred communication method to help reduce anxiety.

4. Implementing Reasonable Adjustments

4.1. Requesting a meeting

Chard Town Council recognises that everyone's experience of physical and mental health is different and can fluctuate over time. This means that identifying, agreeing, and monitoring reasonable adjustments can take time. It also relies on employers and employees talking openly so that everyone's needs are met.

If an employee wishes to discuss any reasonable adjustments, they should arrange to meet with the Town Clerk. If the individual feels unable to talk to the Town Clerk, they should speak to the Chair of the HR Committee.

If a request for reasonable adjustments has arisen during an absence review process, then the monitoring periods set out in the Absence Management

Policy would continue to apply, unless otherwise agreed. Any requests for reasonable adjustments would then be considered alongside any absence reviews being carried out.

4.2. Preparing for the meeting

Chard Town Council understands that some people may find it hard to talk openly about their health. Therefore, prior to the meeting the employee may find it helpful to:

- think carefully about what they want to disclose about their health •

consider how their health affects their work

- think about what reasonable adjustments may help them
- write down notes which can be referred to during the conversation

4.3. During the meeting

During the meeting, the Town Clerk and the employee should discuss any proposed reasonable adjustments and agree a plan.

The meeting might include:

- the employee explaining why they are requesting reasonable adjustments
- the employee explaining which reasonable adjustments they want to make
- discussing whether the suggested adjustments are reasonable (see section 4.4)
- agreeing the reasonable adjustments or adjourning to enable the adjustments to be considered further
- discussing the length of time the reasonable adjustments may be needed
- agreeing a plan to review and monitor the reasonable adjustments •

look at what ongoing support is available.

Where possible, notes should be taken during the meeting and kept as a record for both parties to refer back to.

4.4. Deciding what is 'reasonable'?

The test of whether the requirements requested by a disabled employee/applicant are reasonable is an objective test. It is not about what an individual might personally think is reasonable.

When deciding if an adjustment is reasonable, the Equality Act 2010 sets out the following factors which the organisation must take into consideration:

- Will the adjustment remove or reduce the disadvantage? •

Is the adjustment reasonable for the Council's business? •

Is the adjustment practical to make?

- Is the adjustment affordable?
- Could the adjustment harm the health and safety of others?

4.5. After the meeting

After the meeting has taken place, the Town Clerk should put in writing to the employee details of what was discussed during the meeting. This should include details of any plan / agreements made and a date for monitoring.

4.6. Monitoring

Chard Town Council recognises that an employee's health can change over time. Therefore, the Town Clerk will regularly monitor any agreed reasonable adjustments whilst considering the needs of the employee and the organisation in case anything needs to change.

The Town Clerk will also keep a record of any changes made over time.

4.7. Permanent Changes

Employees who require a permanent change to their working arrangements, such as changing contracted hours, should refer to the organisation's Flexible Working Policy.

5 Occupational Health

At any stage of discussing reasonable adjustments for an employee's health the employer may seek support from an occupational health professional who may be able to give advice on what adjustments might be suitable.

8. ABSENCE MANAGEMENT/FLEXIBLE WORKING

8.1 Unauthorised absence

8.1.1 Employees who deliberately fail to attend work without a good reason will be considered to have committed gross misconduct which could result in dismissal without notice or payment in lieu.

8.2 Sickness absence

8.2.1 The Council is committed to maintaining the health, well-being, and attendance of all its employees.

8.2.2 The Council's Sickness Management Policy is based on the following principles:

- It undertakes to provide reasonable payments to employees who are unable to work due to sickness.
- It will support employees who have genuine grounds for absence for whatever reason. This support includes a flexible approach to the taking of annual leave and returning to work after long term sickness.
- It will respect the confidentiality of all information relating to an employee's sickness and information will be held in line with all data protection legislation.

8.2.3 Regular, punctual attendance is an implied term of every employee's contract of employment and the Council expects every employee to take responsibility for maintaining good attendance and reporting absence according to the procedures set out in this Handbook. Disciplinary procedures may be used if an explanation for absence is not provided or if the reason given is not deemed to be satisfactory.

8.2.4 If an employee is too ill to attend work, they should inform their line manager or the Clerk as soon as practicably possible, either in person or through a third party. You should ensure that you report a sickness absence by telephone to your line manager no later than one hour after your start time.

8.2.5 Where possible, notification of absence by telephone to your line manager should be given the previous evening to allow for cover to be arranged. When reporting an absence, employees should give a clear explanation of the ailment and the anticipated return to work date.

8.2.6 Employees are required to telephone in if they are able and speak directly to their line manager or the Clerk. It is not acceptable to leave a message with a colleague or send an email or text. You may be contacted during the day to discuss your absence.

8.2.7 Employees are encouraged to keep in touch with the relevant person at the Council. This will enable Council to arrange cover if required. You are required to telephone in sick on every day of your absence unless you are able to provide a GP “Fit Note” (Form Med 3). A Fit Note will be required if you are ill for more than seven days in a row. This includes non-working days, such as weekends, bank holidays or any days not normally worked.

8.2.8 If an employee is off work for seven days or less, an employee does not need to provide proof of sickness from a medical professional. However, on returning to work, line managers will ask the employee to confirm they have been off sick in writing on the appropriate form – this is known as ‘self-certification’.

8.2.9 The following are not considered legitimate reasons to take sickness absence:

- Hangovers (this will be regarded as a disciplinary offence which may result in dismissal without notice or payment in lieu
- Issues getting to work such as late bus or car breakdown

8.2.10 If a period of sickness absence occurs immediately before or immediately after a period of annual leave then the Council may require such absence to be certified by a GP at the employee’s own expense.

8.2.11 If an employee is ill just before or during their holiday, it can be recorded as sick leave instead, provided a Fit Note is submitted.

8.2.12 If you are on sick leave for an extended period of time (three weeks or more) the Council reserves the right to refer you to an Occupational Health Professional or seek a medical report from your GP. The reason is to establish when you will be able to return to work and to put in measures that may be able to help you return to work as soon as possible.

8.2.13 If you are off sick you must not undertake any activities that are likely to be detrimental to your recovery. You should cooperate with medical professionals to ensure that your recovery is as rapid as it can be.

8.2.14 If an employee’s absence is not covered by self-certification, a doctor’s statement, or in-patient certificate, it may be treated as unauthorised absence and dealt with using disciplinary procedures

8.2.15 The Council will maintain regular contact with any employee who is on long term sickness absence.

8.3 <u>Return to work</u>

8.3.1 On returning to work, an employee must complete a Self-Certification Form and hand it to their line manager.

8.3.2 Fit notes state whether an employee is either 'not fit for work' or 'may be fit for work'. If it states the employee 'may be fit for work', line managers will discuss any changes that might help the employee return to work, such as different working hours or tasks/duties. However, the employee will be treated as 'not fit for work' if there's no agreement on these changes and cannot therefore, return to work.

8.4 Phased return to work

8.4.1 It may be possible for an employee who is recovering from illness or injury to undertake a limited range of duties as preparation to returning to normal hours. In such cases the Council will endeavour to allow a phased return to work subject to any medical advice. A return to work may involve reduced hours, limiting the scope of the employee's duties or a combination of both. The aim is to bridge the time between sickness absence and normal working so any phased return will be time-limited and will not normally extend beyond a three-month period.

8.5 Alternative roles

8.5.1 If it becomes apparent that an employee who has been off sick for an extended period of time is not able to return to their original role the Council may consider agreeing changes and working hours to an employee's duties and other working arrangements. Any such changes will be subject to the requirements of the Council and there is no guarantee that permanent arrangements of this sort are possible.

8.5.2 Where duties or working hours are varied in this way then the new role being undertaken by the employee will be subject to a job evaluation which may result in an amended level of remuneration. This will need to be agreed by the employee and if an agreement cannot be reached then Council may proceed to dismissing the employee in accordance with its procedure for long-term sickness absence.

8.6 Reasonable adjustments

8.6.1 Council is fully committed to making reasonable adjustments to an employee's duties or working environment in cases where they may potentially suffer some disadvantage arising from a disability.

8.6.2 For reasonable adjustments to be implemented the Council needs to be made fully aware of any disabilities its employees may have. If an employee feels that they need an adjustment, then they should discuss this with their line manager or the Clerk. Any discussions will be in the strictest confidence. However, fellow employees will need to be made aware of why the adjustments are being made. Disclosure of any

personal disability to other employees will be part of the discussions related to the required adjustments requested.

8.6.3 The reason for any adjustments being made will be to ensure that the employee can work effectively in the role that they are undertaking and will be based on appropriate terms and conditions. The Council is not obliged to maintain an employee's level of pay if hours are reduced or the employee is moved to a less senior role as a result of the agreed adjustment. The Council will not agree to an adjustment if the results of that adjustment do not result in a commercially practicable working arrangement.

8.7 Sick pay

8.7.1 Employees will be paid any sick pay in accordance with their contract of employment which sets out the qualification periods for the various periods of sick pay. The Council pays over and above the statutory sick pay depending upon the length of service with the Council.

8.7.2 Entitlement to payment is subject to notification of absence and production of any certificates as referred to above.

8.7.3 The Council operates the sick pay scheme and employees are required to co-operate in the maintenance of necessary records. For the purposes of calculating employee entitlement to sick pay, 'qualifying days' are those days on which employees are normally required to work.

8.7.4 The Council reserves the right to require employees at any time to undergo a medical examination by a medical practitioner nominated by the Council, subject to the provisions of the Access to Medical Reports Act 1988 where applicable. Any costs associated with the examination will be met by the Council.

8.7.5 Whilst on absence due to sickness or incapacity, employees are not permitted to undertake any paid work for another employer or for any business established by employees without express permission from the Council.

8.7.6 The scale of payment is set out in contracts of employment, subject to meeting the conditions of the scheme.

8.8 Sent home

8.8.1 If an employee becomes unwell whilst at work and decides there is a need to go home, the employee must inform their line manager before leaving, primarily for health and safety purposes.

8.8.2 Line managers will discuss with the employee whether the absence is to be treated as a sickness absence or time off in lieu.

8.9 Medical, dental or optician appointments

8.9.1 The Council politely requests employees to make medical appointments outside working hours whenever possible. Paid leave will not normally be granted for non-emergency appointments.

8.9.2 However, where it is not possible, appointments should be arranged to avoid disrupting work schedules, e.g., made early or late in the day. Employees will be required to use TOIL to cover such absences.

8.9.3 Where attendance for a medical or hospital appointment necessitates a complete day's absence from work, this will be treated as sick leave and the procedure for self-certification should be followed.

8.9.4 Employees who have a medical condition that requires regular appointments during the working day should discuss their situation with their line manager or Clerk so that appropriate arrangements can be made.

8.10 Ante-natal care and adoption appointments

8.10.1 Employees who are pregnant are entitled to paid time off to attend ante-natal clinics provided that time off is based on medical advice. For second and subsequent appointments you may be requested to provide appointment cards or similar evidence indicating the date and time of appointment.

8.10.2 There is no limit to the number of appointments an employee can attend you are requested to take reasonable steps to arrange ante-natal appointments at a time that will create minimum disruption to your working day.

8.10.3 If your partner is pregnant you are entitled to unpaid time off for up to two ante-natal appointments. Please notify your line manager or Clerk if you wish to exercise this right.

8.10.4 Employees who are adopting on their own, or have elected to be the primary adopter, may take paid time off to attend up to five adoption appointments in certain circumstances.

8.10.5 If you are the partner of the primary adopter you are entitled to unpaid time off for up to two adoption appointments.

8.11 Maternity leave

8.11.1 All employees who give birth are entitled to a maximum of 52 weeks maternity leave. Employees with at least six months service will also be entitled to be paid Statutory Maternity Pay (SMP) for up to 39 weeks of their absence. For the first 6 weeks you will be entitled to 90% of your

average weekly salary. For the remainder of the 39 weeks, you will be entitled to the statutory figure (April 2023 £172.48) or 90% of your average salary over the preceding six weeks prior to maternity leave whichever is the lesser figure. As this is a statutory payment, employees must meet the procedural requirements to ensure they qualify. The main requirements are set out below:

- Meet certain National Insurance contributions lower earnings limit requirements
- Have 26 weeks' continuous service (assessed at the 15th week before the baby is due)

8.11.2 Payments for employees who have completed 1 year's continuous local government service at the 11th week before the Expected Week of Childbirth (EWC) shall be as follows:

- For the first six weeks of absence an employee shall be entitled to nine-tenths of a week's pay offset against payments made by way of SMP or Maternity Allowance (MA) for employees not eligible for SMP
- An employee who declares in writing that she intends to return to work will for the subsequent 12 weeks' absence receive half a week's pay plus SMP, where eligible, without deduction except by the extent to which the combined pay and SMP (or MA and any dependant's allowances if the employee is not eligible for SMP) exceeds full pay. Alternatively, the equivalent amount (i.e., 6 weeks' pay) may be paid on any other mutually agreed distribution. For the remainder of the maternity leave period the employee will receive their entitlement to SMP currently 39 weeks in total), where eligible

- For employees not intending to return to work payments during their maternity leave period following the first 6 weeks will be their entitlement to SMP (currently 39 weeks in total), where eligible

- Payments made by the authority during maternity leave under bullet point 2 above shall be made on the understanding that the employee will return to local authority employment for a period of at least three months, which may be varied by the local authority on good cause being shown and, in the event of her not doing so, she shall refund the monies paid, or such part thereof, if any, 20 as the authority may decide. Payments made to the employee by way of SMP are not refundable.

8.11.3 To qualify for maternity leave you must provide Council with the following information no later than the end of your 15th week before your EWC (when you are about six months pregnant):

- Confirmation that you are pregnant
- The date of the week that your baby is due

- The expected commencement date of your maternity leave
- The original Maternity Certificate (MAT B1) issued by your doctor
- Confirmation or otherwise that you will take advantage of your right to shared parental leave

8.11.4 If you are unable to provide the MAT B1 certificate please discuss this with your line manager or the Clerk as it is always possible to accept alternative medical evidence of the date your baby is due.

8.11.5 Maternity leave cannot commence prior to the 11th week before your EWC. You may begin your maternity leave then or, if it is safe to do so, you can work right up to your child's birth.

8.11.6 Maternity leave will begin automatically if you are off sick for a pregnancy related reason at any stage in the four weeks prior to your EWC.

8.11.7 If your baby is born prior to the start of your maternity leave date your maternity leave will commence the following day after birth.

8.11.8 You may change or amend the date you intend to commence your maternity leave, but you should inform Council 28 days before your original maternity leave date. If you are unable to for any reason, please let your either line manager or Clerk know so that Council can try to accommodate the change in your circumstances.

8.11.9 Please inform Council as soon as you are able when your baby is born.

8.11.10 The standard length of maternity leave is 52 weeks. Council will assume that you intend to take 52 weeks maternity leave unless you inform it otherwise. It will provide written notification of your expected return date. If you wish to return earlier, please let Council know. Please contact your line manager or the Clerk to let them know when you intend to return to work though you do not have to give notice of your intended return date.

8.11.11 At the end of your maternity leave you are entitled to return to the same position prior to going on maternity leave. If you are away for more than 26 weeks, then there may be circumstances when this will not be practical. In such cases Council will provide you with a suitable and appropriate role at the same level of seniority and on no less favourable terms and conditions.

8.12 <u>Dismissal or resignation during maternity leave</u>

8.12.1 During your maternity leave you are still employed by the Council, and you will be required to meet the conditions contained within your contract of employment. If you wish to leave your employment, then you must resign in the normal way.

8.12.2 Council will not dismiss you for any reason that is related to your pregnancy or any rights that may arise from it. If separate circumstances require the Council to dismiss you then that will bring your maternity leave to an end.

8.12.3 If your position is made redundant during your maternity leave then you will be offered suitable alternative roles that may become available.

8.12.4 You will be entitled to Statutory Maternity Pay (SMP) if you have at least 26 weeks service prior to your 15th week before the expected week of childbirth and if your pay is above the lower earnings limit for paying National Insurance Contributions. Note that this normally changes annually. For those who earn below this threshold you may be entitled to the state benefit Maternity Allowance.

8.12.5 Council requires 28 days' notice before your intended maternity leave start date if you wish to claim SMP. If it is not possible to give 28 days' notice, please give as much notice as reasonably practical.

8.12.6 Entitlement to SMP will be affected if you undertake any paid work or are taken into legal custody at any time during the 39 weeks you are entitled to SMP. Please inform the Council as soon as possible of any changes in circumstances.

8.13 Early/late return to work (post maternity leave)

8.13.1 If you wish to return to work sooner than the 52 weeks for whatever reason please let the Council know at least 8 weeks prior to your official return. This is the minimum period of notice Council is entitled to. If you do not inform Council 8 weeks prior to your intended return to work date this will result in a delay.

8.13.2 The law does not allow you to return to work during the two weeks following the birth of your child.

8.13.3 You are required to return to work following your maternity leave on the notified expected date of return. If you are unwell on that date, you should follow the sickness absence procedure in Section 8.7.

8.13.4 You may be entitled to begin some other period of leave such as annual leave or parental leave. Please ensure that you follow the correct procedure outlined in this handbook.

8.14 Keeping in touch (KIT) days

8.14.1 Keeping in touch (KIT) days are intended to facilitate a smooth return to work for women returning from maternity leave. Before going on leave, the employer and the employee should discuss and agree any voluntary arrangements for keeping in touch during the employee's maternity leave. An employee may work for up to 10 KIT days during

Ordinary Maternity Leave or Additional Maternity Leave without bringing her maternity leave to an end. An employee may not work during the two weeks of compulsory maternity leave immediately after the birth of her baby.

8.14.2 The work can be consecutive or not and can include training or other activities which enable the employee to keep in touch with the workplace. Any such work must be by agreement and neither the employer nor the employee can insist upon it. Such workdays may, at the discretion of the Council, accrue pay at the normal rate for the individual. They will not affect maternity pay.

8.14.3 The Council and the employee can also have reasonable contact during the leave period to discuss such issues as the details of returning to work, this does not count towards the 10 KIT days.

8.15 Maternity suspension for health & safety reasons

8.15.1 In certain circumstances it may be unsafe for you to continue in your job while you are pregnant. In some circumstances the law requires pregnant employees to be suspended on full pay or transferred to alternative roles. These will be identified under risk assessments carried out under the Council's Health & Safety policy.

8.15.2 If you are affected by any health and safety issues connected to your pregnancy, please discuss this with your line manager or the Clerk so that alternative arrangements can be made until it is safe for you to return to your normal duties.

8.16 Adoption leave

8.16.1 Employees who are matched with a child for adoption may be entitled to take up to 52 weeks' adoption leave. This is also available to individuals fostering a child under the "Fostering for Adoption" scheme.

8.16.2 When two parents are adopting a child only one may take adoption leave and the other is entitled to take paternity leave. If both parents qualify, they may each take shared parental leave.

8.16.3 The arrangements for taking adoption leave are similar to those related to maternity leave although there are a number of important differences. The key differences are outlined below. If you are unsure, then please discuss this with your line manager or the Clerk:

- Notify the Council within seven days, or as soon as practicably possible, of you being notified that you have been matched with a child for adoption
- The notification should include the date the child is expected to be placed with you and the date you wish to start your adoption leave. This can be changed as with maternity leave

- Please provide Council with proof of adoption
- Adoption leave is the same duration as maternity leave. Leave can commence from the date the child is placed with you or any time in the two weeks prior
- If the placement is terminated for any reason, then adoption leave will continue for 8 weeks beyond the end of the placement. Following that you will be expected to return to work.
- Adoption pay is similar to SMP
- Return to work is the same as maternity leave

8.17 Paternity leave

8.17.1 Employees with 26 weeks continuous service are entitled to take paternity leave if they are expected to have paternal responsibility for a child and they are either the mother's partner or one of the adoptive parents. The reason for the leave must be to either care for the child or provide support for the child's mother or adoptive parent.

8.17.2 Employees that are entitled to take paternity leave can take one or two weeks leave. If the employee wishes to take two weeks leave, then it must run consecutively. Individual days can only be taken with the approval of Council.

8.17.3 Paternity leave can only be taken once the child has been born and should be taken within the first eight weeks following birth. If a child is born prematurely then the eight weeks commenced from the expected week of childbirth.

8.17.4 You must notify Council at least 15 weeks before the expected week of your child's birth, or within 7 days of being notified that a child will be placed for adoption, that you wish to take paternity leave. You must state the length of paternity leave you wish to take. Council requires 28 days' notice of any changes.

8.17.5 Paternity leave is paid at the statutory rate which changes annually.

8.18 Parental leave

8.18.1 Parental leave is unpaid leave that is flexible and aims to help employees to spend time caring for their children. Parental leave can be taken up until the child's 18th birthday.

8.18.2 Employees who have completed one year's service are entitled to 18 weeks unpaid parental leave for each child born or adopted. The leave can start once the child is born or placed for adoption with the employee or as soon as the employee has completed a year's service, whichever is later. The limit on how much parental leave each parent can take in a year is 4 weeks for each child.

8.18.3 Employees must take parental leave as whole weeks (e.g., 1 week or 2 weeks) rather than individual days, unless the child is disabled. Parental leave does not have to be taken all at once. A 'week' equals the length of time an employee normally works over 7 days.

8.18.4 The Council provides more flexibility in respect of disabled children. Please discuss your requirements with your line manager or the Clerk.

8.18.5 Parental leave requests should be submitted at least 21 days in advance and whilst the Council will do all it can to accommodate requests it does reserve the right to postpone any leave for up to six months based on Council needs and requirements.

8.18.6 There is no need for postponements if you wish to take your first instalment of leave immediately after the birth or adoption of the child. Please inform Council of your intentions 21 days before the expected date of birth or placement. Leave begins immediately following birth or placement.

8.18.7 Parental leave is an entitlement that can be transferred from one employment to another. You may therefore join the Council with some outstanding parental leave attached to a particular child. Please note that the qualifying period for taking parental leave still applies and you will need to have been in the Council's employ for at least one year before you can resume taking parental leave.

8.19 Shared parental leave

8.19.1 This is a flexible form of leave available to both parents and is designed to enable and encourage shared parenting in the first year of a child's life. It provides a more flexible pattern of leave than under traditional arrangements under which the mother takes extensive maternity leave and the father takes a shorter period.

8.19.2 If you give birth or adopt you remain entitled to the full 52 weeks of leave if you choose. You may take consecutive parental leave. In such cases the arrangements when you return to work remain the same as with maternity or adoption leave.

8.20 Special leave arrangements

8.20.1 Sympathetic consideration will be given to any hardship, difficulty or special circumstances which might necessitate a request for absence from work on compassionate grounds. Such circumstances might include bereavement or severe illness of a close relative or dependant. Whilst employees are expected to use their annual leave as far as possible for attending to such personal matters, special leave in excess of any statutory entitlement may be allowed in exceptional circumstances at the discretion of the Clerk. Each request will be

considered on its own merits but as much advance notice as possible must be given.

8.20.2 Requests for unpaid leave will not normally be allowed except where they relate to the special circumstances described above.

8.20.3 Employees are not eligible to receive paid bereavement or compassionate time off benefits while off, or absent from work because of holiday, sickness (paid or unpaid) or for any other reason.

8.21 Parental bereavement leave

8.21.1 Employees are entitled to Statutory Parental Bereavement Leave (SPBL) if a child (under the age of 18) they were parents to or due to have parental responsibility for has died or been stillborn after 24 weeks of pregnancy.

8.21.2 This right applies to the:

- birth parent
- natural parent (the person who gave birth to the child who has since been adopted, but has a court order to allow them to continue having access to the child)
- adoptive parent if the child was living with them
- person who lived with the child and had responsibility for them, for at least 4 weeks before they died
- 'Intended parent' – due to become the legal parent through surrogacy
- partner of the child's parent, if they live with the child and the child's parent in an enduring family relationship

8.21.3 This leave can be taken as one week, two consecutive weeks, or two separate weeks at any time within the first 56 weeks after the child's death.

8.21.4 During the first eight weeks following the death of a child you or someone on your behalf need only give notice to the Council that they will take SPBL before you are due to start work on the first day of leave. If you have already started work, then officially your SPBL period will commence from the following day. You may cancel it at any time during the first seven weeks as long as the leave has not started.

8.21.5 After eight weeks you are required to give at least one week's notice to the Council to take SPBL. You may cancel with one week's notice or re-book it by giving one week's notice.

8.21.6 When fiving the Council notice to take SPBL you must provide the Council with the date of the child's death, when your leave will begin and whether you wish to take one or two weeks leave. Notice can be given by telephone, email, or letter.

8.21.7 You must have six months continuous employment to qualify for Statutory Parental Bereavement Pay (SPBP) and normal weekly earnings of at least the lower earnings limit. The rate of pay is the same as statutory family leave pay. This normally changes annually.

8.21.8 To claim SPBP you must confirm the following information in writing within 28 days of starting any period of SPBP. (This information can be provided at the same time as giving SPBL notice provided it is in writing):

- Name
- Entitlement to SPBP
- Dates of your SPBP claim
- The date of the child's death
- Your relationship to the child

8.21.9 In addition to parental bereavement leave if you qualify for:

- Maternity or parental leave and pay and your child has died or been stillborn, you are entitled to such leave and pay
- Adoption leave and pay, then the adoption leave entitlement runs for another eight weeks from the end of the first week in which the child died, unless it would have already ended sooner

8.21.10 If your planned period of SPBL occurs at the same time as another statutory family leave right your SPBL leave will end at the start of that other leave. If you do wish to take SPBL at the end of the other statutory family leave period, you will need to submit a fresh notice to take leave to the Council in line with the requirements above.

8.22 <u>Time off to deal with a family emergency</u>

8.22.1 The Council acknowledges that there may be times when employees need to take time off work to deal with family emergencies that involve someone who depends on you. This includes husband, wife, partner, child, parent, or someone living with you as part of your family. In addition to this there may be others who rely solely on you for help and support in emergencies.

8.22.2 All employees are entitled to a reasonable time off work without pay or through the usage of TOIL, to deal with an emergency involving a dependant. For example, if a dependant falls ill or is injured, if care arrangements break down, or to arrange or attend a dependant's funeral. Employees must alert their line manager as soon as practicably possible of any absence to deal with a dependant.

8.22.3 The right for time off only covers emergencies. If you are aware that you may need time off in advance you do not qualify for this type of

leave, and you will need to arrange an alternative form of leave with the Council.

8.22.4 If an emergency occurs and you are unable to inform your line manager in advance of your absence then you must make every effort to inform them as soon as possible so alternative arrangements can be put in place.

8.22.5 For other personal emergencies you should talk to your line manager who will decide to grant you compassionate leave. This will be at the discretion of the Council and will depend on the individual circumstances of the emergency and the impact on the delivery of Council services your absence may have. However, the Council will be sympathetic to your need for time off, either paid or unpaid, to enable you to deal with the situation.

8.23 Annual leave

8.23.1 Your annual leave entitlement is set out in your contract of employment.

8.23.2 All annual leave should be agreed in advance with the Clerk or line manager. Please do not make arrangements to travel or any commitments until you have received authorisation granting your request for annual leave. Council is not obliged to take arrangements made prior to receiving a holiday request when it conflicts with other holiday requests.

8.23.3 Normally only two consecutive weeks leave can be granted at any one time. However, in certain circumstances and at the discretion of Council a longer period may be granted. Please discuss this with the Clerk.

8.23.4 The normal requests for leave should be submitted at least four weeks prior to the start date of your holiday. This may be subject to change, and you should comply with any amended procedures that are in place.

8.23.5 If your request results in the Council being understaffed or prejudiced then your annual leave request may be refused. Leave may be refused during particularly busy periods or if other employee requests have already been approved.

8.23.6 All leave requests will be considered on a first come, first served basis. Every effort will be made to ensure that holiday is spread throughout the year and on a fair and equitable basis,

8.23.7 All employees are encouraged to take their full holiday entitlement during the holiday year that runs from 1st April to 31st March the following year. You as the employee are responsible for scheduling and requesting your holiday entitlements so you can take time off.

8.23.8 Under normal circumstances employees will not normally be entitled to carry holiday over into the following year. In certain circumstances and at the Council's discretion you may be entitled to carry over a proportion of your annual leave entitlement into the following year. This will normally be a maximum of five days and any holiday entitlement not taken will be lost except in very exceptional circumstances.

8.23.9 If you leave the employ of the Council during the course of a holiday year you will be entitled to a pro rata payment reflecting leave accrued but not yet taken. If an employee had taken a larger proportion of their holiday entitlement prior to leaving the Council employ, then the Council will deduct that proportion from your final salary payment to reflect holiday taken but not accrued.

8.23.10 Council may wish to insist that annual leave is taken at particular times of the year depending in the needs of the Council and this will be set out in your contract of employment. Council will give reasonable notice of any such requirements and that notice will be at least four weeks' notice.

8.23.11 Council may require annual leave to be taken during any period of notice of an employee who has resigned or been dismissed.

8.24 Flexible working

8.24.1 Requests for a change in working arrangements as outlined in their original contract of employment can be made by employees who have 26 weeks of continuous service with the Council.

8.24.2 Requests should:

- Be submitted in writing stating that it is a Flexible Working request
- Outline in detail the changes being requested
- Outline the impact that the requested change will have on the operation of the employee's role and that of the Council and provide details of how any difficulties created will be addressed
- Detail any previous request for flexible working

8.24.3 All requests will be discussed at a meeting with the Council. Attendees will include the employee submitting the request, the line manager and the Clerk.

8.24.4 The employee may be accompanied by a fellow employee to support and assist in making any appropriate representations.

8.24.5 A request can be refused on one or more of the following grounds:

- Significant additional costs to the Council
- A detrimental effect on the Council's ability to meet the demands and requirements of its customers

- An inability for the Council to re-organise work among existing employees
- A requirement or inability to recruit additional staff
- A detrimental impact on the quality of services offered by the Council
- A detrimental impact on performance
- Insufficient work that can be carried out during the periods the employee proposes to work
- Any planned organisational or staffing restructures
- Any other grounds that are allowed by regulations

8.24.6 If the Council refuses a request for flexible working, then it will explain the reasons for the refusal and may suggest an alternative arrangement. If a compromise cannot be reached then the employee's terms and conditions will remain unchanged, subject to the right of the employee to appeal against the decision.

8.24.7 The Council will endeavour to accommodate requests for flexible working arrangements from employees and all discussions will be undertaken in the spirit of cooperation.

8.24.8 Any agreed changes to working arrangements will be confirmed in writing.

8.24.9 Ad-hoc arrangements will not be affected by this but will not result in a variation of the employee's terms and conditions of employment unless specifically agreed and confirmed in writing. Council reserves the right to terminate any ad-hoc agreements and employees will be expected to return to their agreed original working arrangements.

8.24.10 Any agreed changes in working arrangements with individual employees will not create a precedent. Each request will be reviewed by Council on an individual basis and all employees must accept that Council is not obliged to grant any particular working arrangement enjoyed by one employee to another.

8.25 <u>Jury service/time off for public duties</u>

8.25.1 Employees have a right to time off from work either with or without pay in a number of circumstances. These include Jury service and other duties including serving as a local councillor, magistrate, or school governor.

8.25.2 Such public positions held should be notified to the Council when accepting an offer of employment or as soon as the position is taken on, whichever is sooner.

8.25.3 Requests for time off for Public Duties will be considered with or without pay.

8.25.4 The amount of time off allowed will be at the discretion of line manager or Clerk and will take account of time off already received and the effect of the absence on the satisfactory running of the organisation. The maximum period will be 10 days.

8.26 Reserved forces

8.26.1 Council will support employees who are members of the reserved forces. These employees have specific entitlements relating to time off work including arrangements for them to return to work following a period of deployment.

8.26.2 Employees are encouraged to discuss the implications of being a member of the reserved forces, or if they are thinking of joining, with their Line Manager or Clerk.

8.27 Trade union membership

8.27.1 All employees shall be free to join an appropriate trade union.

8.27.2 Reasonable time off with pay to undertake Trade Union duties will be allowed to recognised trade union representatives to enable you to undertake duties concerned with industrial relations within the organisation.

8.28 Studies/training

8.28.1 The Council is committed to encouraging and facilitating development of all its employees. Where studies are undertaken that coincide with normal hours or work, an agreement will be made on the working arrangements with line managers and authorised by the Clerk.

8.28.2 The Council will usually grant paid time off for ad hoc training courses arranged through the Council as part of your personal development.

8.28.3 Where qualifications are paid for by the Council, an agreement will be put in place for the employee to repay a percentage of the cost of the course if they leave the Council's employment over a two-year period after having completed the course.

Chard Town Council
Staff Annual Appraisal Policy

1. Aims

The aim of this policy is to provide guidance for those who carry out annual appraisals of staff. It describes, in a chronological order, the arrangements for preparing, conducting and reporting upon appraisals.

This document also identifies the annual appraisal forms and provides instructions on their completion.

2. Objectives

The objectives of the performance appraisal process are to provide a platform for the appraisers and appraisees to review aspects of the individuals job performance on an annual basis, as follows:

- To review past performance over the previous year, including the achievement of set objectives and any constraints on progress, with a view to identifying solutions.
- Discuss the employee's strengths and identify any areas for improvement and development within the current role. The objective is to equip each individual with the wherewithal to perform their job to the best of their ability and gain maximum job satisfaction.
- Take the opportunity to communicate the Council's future plans, how the individual fits within them and can make the best contribution possible towards their achievement. Against this identify the employee's future ambitions, plans and long-term potential.
- Setting of objectives for the forthcoming year arising from the Council's Work Programme, projects, personnel development and team development, where appropriate.

3. Related Documents

- Staff Annual Appraisal Self Assessment Form
- Staff Annual Appraisal Form

4. Introduction

Each year, appraisals will be carried out at a meeting between the line manager (appraiser) and the employee (appraisee). The Clerk's appraisal will be carried out by the Council Chairman and a the Chairman of HR Committee and, if that is the same person, then another Councillor from the HR Committee. Each of the other members of staff will take part in an appraisal with the Clerk.

The intention of the review is to create a space where the appraisee and the appraiser can discuss various aspects of the employee's role, their performance within the role and the

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Council as a whole. The appraisals are to both take stock of the previous six months/year and to motivate the employee to take on the challenges of the coming year. Dialogue throughout the year between the appraiser and the appraisee will inform the content of the meeting. The outcome of the discussions

should be a clear plan for both participants in terms of action to be taken. This is to ensure that the appraisee is enabled to achieve their full potential in the work that they carry out for the organisation.

It is important that the appraisal scheme focuses upon some clear objectives so that the effort it demands from both the appraiser and the appraisee can be directed towards specific outcomes. The benefits of appraisal in terms of improved communication and enhanced performance, both for the individuals involved and for the organisation, will be achieved only by the continuous commitment of all those involved in the scheme.

Employees should be made aware of the purpose of the appraisal process, how it will be run and what is expected of them. If they are not already aware and familiar with this particular process, a presentation to all the appraisees will be required.

Note: Appraisals are not a pay review and are therefore not an opportunity to discuss pay. Determining pay is a separate process.

5. Planning Appraisals

Each year the Clerk will prepare a schedule so that each member of the team, including the Clerk, are allocated a time around January for a staff annual appraisal meeting and an interim review about six months later. Each participant will add the meetings to their diaries to ensure that the time is reserved. Staff annual appraisal meetings will be held between the issue of the Council's work plan for the coming year and the sign-off of the budget. This is to ensure that objectives are aligned with work plan activities and that there is sufficient funding for in the budget for the training identified.

Note: The identification of training needs is not a guarantee that funding will be made available during the budget approval process.

The appraisal interview schedule will start with the Clerk and continue down the hierarchy in order that communication of Council's objectives can be effectively delivered. It is important that these objectives are considered when discussing performance and development with each individual. This is so that the appraisees remain clear about the importance of their work within the context of the organisation's objectives and that any planned development is relevant to the organisation's needs.

All staff with over six months' service will be included on the appraisal schedule. New staff, who are still in their probationary period, will be seen as normal for their probation review meetings and will be set objectives covering the period to the next appraisal cycle.

It is important to chose meeting times convenient for the appraiser and the appraisee, when it is

likely that the demands on both individuals are less than usual. This is to ensure that both parties can focus on the appraisal and be 'present' in the meeting, rather than being distracted by workload and imminent deadlines.

The location of the appraisal must be in a room where the meeting can be held without disturbance. For the duration of the meeting, it is important that the employee is the focus of the line manager's attention and that neither are distracted by their computer, telephone or visitors.

6. Appraisal Forms

The appraisal forms are designed to prompt appraisers and appraisees to focus on the correct agenda in line with the objectives of the appraisal scheme.

Appraisal forms are available on the Council's intranet. They are downloadable so that appraisers and appraisees can choose whether they prefer to complete documents electronically or as hard copy.

7. Review Preparation

Before their appraisal, appraisees will complete an Annual Appraisal Self Assessment form. The form is designed to prompt appraisees to give some thought to the areas that the appraisal meeting will address. When complete, they will send or pass it to the appraiser at least one week ahead of the appraisal meeting to enable the necessary research and preparation.

The appraiser must have the necessary facts about the appraisee's performance at the time of the appraisal interview. Prior to the appraisal, the appraiser may approach councillors and appropriate others, not necessarily within the Council, for their written feedback. They should regularly work or have contact over work, with the person being appraised. Feedback may take the form of an e-mail but however it is communicated in writing it must be factual and contain at least one specific example for each point made. Having specific examples will be particularly important if you need to discuss aspects of an appraisee's performance that are not wholly satisfactory. Feedback gained in the course of normal business may also be valid and can be utilised.

Note: It is important that the appraiser separates fact from opinion in feedback received, particularly where the feedback is negative.

The appraiser should also review the appraisee's job description and previous appraisal form, taking note of objectives set and any training agreed. The appraisee's self-appraisal form must be reviewed. It provides advance notification of the appraisee's views and opinions about their performance, future development and any contentious issues that the appraisee wishes to raise.

In addition to the appraisee's performance, the appraiser should consider aspects of the appraisee's behaviours. For example: has thorough knowledge of the job, uses initiative to solve problems, exercises sound judgement, works to high standards, maintains a high work

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rate, can be relied upon to deliver on commitments, works well as part of a team, takes responsibility for problems and is accountable for actions

8. The Appraisal Meeting

Mobile phones must be muted or better still left outside the room. It is important that the appraisee is the focus of the appraiser's attention for the duration of the appraisal. Failure to devote the meeting to being with the other person demonstrates a lack of respect that is likely to be offensive.

It is also important that the appraisee can leave the review feeling that they have been given the time and opportunity to have their say. Equally the appraiser must not leave the meeting without having delivered adequate and accurate feedback to the appraisee, especially where there are any negative connotations.

When addressing negative feedback, under normal circumstances, it should not come as a surprise to the appraisee because the appraiser should have already addressed any issues and not 'saved them up' for the review meeting.

The appraiser's purpose in delivering negative feedback is to state the facts so as to open up a discussion on the issue and gain the appraisee's acknowledgement of the problem. The appraiser can then set tangible objectives for improvement, agreed with the appraisee and establish if any support is needed that can be provided by the organisation.

The appraiser must record the issue, the improvements required, objectives set, timescales and any significant points from the discussions, such as support requested by the appraisee.

The Annual Appraisal Self Assessment form is to be used as the basis of the discussions and it is recommended that the appraiser goes through each of the discussion points on the form in turn.

As the format of the meeting is a discussion the appraiser is to encourage the appraisee to speak about each point by asking open ended questions before the appraiser gives their feedback and picks up on points raised by the appraisee.

To add value for the Council, when identifying individual training, development and career needs, discussions should focus upon genuinely assisting the appraisee in acquiring the relevant skills, knowledge and behaviours (competencies) for them to perform well in their current role. Opportunities for advancement or alternative work may also be on the agenda.

When setting objectives for the coming year, they should be related to the appraisee's job, career and skills that both supports the direction of the Council and development of the appraisee. Objectives supporting the Council may come directly from the work programme for the coming year or may be supporting another's objectives taken from the work programme.

Objectives should be limited to a maximum of five to ensure that the appraisee has sufficient time to work through them and complete them to the best of their ability. They must be defined

in a SMART manner, meaning:

- Specific – clearly defining what is to be done and the end result expected, to avoid misinterpretation.
- Measurable – where possible, so that progress and completion can be assessed.
- Achievable – completion is within the reach of the appraisee but is still challenging. • Realistic – practical and representative of objectives set by the organisation.
- Time Bound – when the objective or defined progress towards it has to be achieved.

Objectives must be agreed with the appraisee.

9. Completion of The Appraisal

The Annual Appraisal Record form must be completed as a faithful record of a summary of the discussion that took place at the appraisal meeting. The action summaries should be used as a planner so that any agreed outcomes are followed up conscientiously. The assessor will make notes during the appraisal and complete the form in handwritten or typed format after meeting. The back of the form may be used to make any additional notes, where there is insufficient room on the front.

Note: Where it is not obvious, entries on the back of the form must identify the applicable discussion point to which they refer.

After the review meeting when the form has been completed, the appraisee will be given the form to read, sign and date, as confirmation that it is an accurate record of what was said. If the appraisee does not accept the comments made or objects to the way that the appraisal was carried out, then after further discussions they have the right not to sign and date the form. The issues will be referred to the Chair of the HR Committee, or Deputy Chair if the Chair is unavailable, for investigation and final decision. The appraiser will always sign and date the form.

The Town Clerk's Appraisal will be "approved" by HR Committee as required by Standing Orders and completion of the Appraisal reported to Full Council.

Performance against objectives, timescales, support provided and any improvement actions, will be formally reviewed at the next appraisal meeting. However, the appraiser should carry out one or more informal interim progress reviews.

Filing the Appraisal Forms

The appraisal forms contain information confidential to the appraisee and the Council. In some cases, data collected may include special categories of data e.g. information about an employee's health. When conducting an appraisee's appraisal, the organisation processes personal data collected in accordance with its data protection policy. The Clerk will retain the forms securely between appraisals.

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Data collected as part of the operation of the appraisal process will be held securely and kept for no longer than necessary. It will be accessed by and disclosed to individuals only for the purposes of managing their appraisal. Inappropriate access or disclosure of employee data constitutes a data

breach and should be reported in accordance with the Council's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the organisation's disciplinary procedure. in which case more stringent rules apply.

The appraisee is entitled to a copy of the appraisal forms upon request.

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9. SUPERVISION AND APPRAISAL

9.1 Supervision – one-to-one meetings

9.1.1 The prime source of information regarding an employee's role or the organisation is a line manager. It is part of a line manager's role to inform, answer questions and listen to constructive opinions, comments, or suggestions. These meetings will be conducted as part of the Council's Performance Management and Appraisal Scheme.

9.1.2 The responsibility to ensure regular one to one meetings and reviews are undertaken lies with both the employee and line manager. This is an important, two-way communication and performance management process.

9.1.3 In addition, there will be regular staff meetings and team meetings to discuss work requirements, health and safety and any other pertinent matters.

9.2 Appraisal scheme

9.2.1 All employees take part in the annual appraisal process as detailed in the Council's Performance Management and Appraisal Scheme. These are positive exercises designed to encourage and assist employees in their professional and personal development.

9.2.2 It is the Council's policy that employees should have regular supervision with their line manager and an annual appraisal.

9.2.3 A copy of the Council's Performance Management and Appraisal Scheme is available from your line manager or Clerk. This will include details of the annual appraisal process and the required input from each employee.

9.2.4 A record of the supervision or appraisal meetings will be kept on individual personnel files. These files will be kept in accordance with the Council's Document Retention Policy.

HR Committee

13th July 2026

Community Development Worker

Purpose of Report

This report describes the role of Community Development and asks Committee to Recommend to Full Council.

Recommendation:

Committee is asked to **RESOLVE** to Recommend to Full Council the appointment of a Community Development Worker to end March 2027.

Background:

1. A Community Health and Wellbeing Grant was awarded to Chard Town Council by Somerset Association of Local Councils on 4th April 2025. The key deliverable of this was to create a stand-alone project to establish and maintain a digital information directory for all the people of Chard for all ages and needs. It was to be led and co-ordinated by Chard Town Council to improve the health and wellbeing of residents.

2. The Stakeholder Liaison Officer was appointed (SCP 29) pro rata 22.5 hours pw. on a temporary contract to 4 September 26. The role was advertised and appointed an Officer who also works part-time as a Community Champion with Connect Somerset appointed by Holyrood Academy. The focus of work for the Council has been on the KIND project and now ready to be “launched” the Chard.info project.

3. Funding for the role was provided at £23k administered by SALC from the Community Health and Wellbeing fund. The funding has been provided via SALC.

Report:

4. The budget 26/27 does not include any funding for the post, including none of the £23k provided via SALC. Year 26/27 employment costs for the Stakeholder Liaison officer to September 26 are projected to be £17k.

5. A role of Community Development Officer (CDW) is likely to be part of re-organisation proposals to be presented to Full Council, if approved to proceed, towards end of 2026. Therefore, in anticipation of that it is Recommended that a Community Development Officer is appointed to end March 2027, not least as the Stakeholder Liaison Officer is due to end 4 September 2026. Any further funding for a CDW post would be considered as part of re-organisation.

6. This paper provides a description of the role and work of a Community Development Officer (Appendix A) and a draft Job Description (Appendix B).

7. The budget 26/27 staff budget is £627k. Employment costs 26/27 are evaluated at £582k; in addition £12.9k is needed to pay the nationally negotiated pay settlement; a further £14k costs would be incurred in providing backfill, against which a budget 26/27 £15k has been included.

8. It is evaluated that the cost of a CDW to end March 2027 is an additional £17.7k which can be accommodated in the current 26/27 staff budget, together with the nationally negotiated pay settlement £12.9k and backfill £14k.

Name: Stephen Hill
Post: Town Clerk & RFO
Date: 8 July 2026

APPENDIX A

1. To liaise with residents and stakeholders in the community, helping to foster social inclusion, community resilience, and engagement in civic life. To include Statutory agencies for example, Somerset Council, police, health, education, housing, and those in Community, Voluntary, Faith and Social Enterprise (CVFSE) sectors and businesses. All to maintain a wide network of contacts and disseminate information, and networking opportunities.
2. The above engagement should continue to maintain and build on this wide network of contacts to disseminate information and develop networking opportunities.

3. Chard.Info A officer is required to continue the development and maintaining of Chard Town's Council online directory. This involves continuous relationship-building and data governance to ensure the platform remains a reliable, up-to-date resource for residents and professionals.

4. Corporate Responsibilities: An officer's time is required to contribute towards policy and delivery the aims of the council's safeguarding, equality, diversity and inclusion policies.

5. Local Governance: Somerset Council operates a vast network of (LCNs) that group together town and parish councils, the voluntary sector, and local services to tackle area-specific priorities. An officer should be available to attend, contribute and disseminate information from the Local Community Networks.

6. Full Council, 2026/84 Representatives on External Bodies: Council representation on or work with external bodies, including number of representatives was reviewed and arrangements/frequency for reporting back were agreed. An officer will facilitate links between councillors, community representatives and outside agencies.

7. Grants: An officer will be required to investigate funding opportunities for specific projects. To promote the Council's Grant Scheme to assist local organisations with applications, reviewing information and for successful applicants to report back to the Council.

8. Children and Young People: An officer to engage with the Youth Service providers and to be the principal point of contact. To oversee the Youth Council.

9. Community Safety in Chard Including an Update Report - CCTV & Anti-Social Behaviour, Item 2026/103. It was agreed:
   A) Continue to work in partnership with strategic and local organisations to promote Community Safety in Chard.
   B) Develop a Chard Community Safety Policy, led by a Council Committee and reported back to Full Council.

C) Develop a Chard Community Safety Strategy & Action Plan to implement a Community Safety Policy to reflect local community safety improvements and the Chard Town Council Strategy agreed in 2025.
D) Continue to promote and strengthen resilience and safety in the community.

The Stakeholder Liaison Officer was named as Project Lead.

10. Community Plan. To empower local residents, public and voluntary agencies to raise awareness of local issues, increase community involvement in decision-making to create a Community Plan to improve physical, environmental, and social well-being. Officer time

11. Projects For the Town Council to engage and offer support to a range of local projects, such as Cradle to Career, Great Mead and Best Start in Life Family Hub.

12. Community Development Professional development, CPD. To participate in local government training programme alongside other officers as Chard Town Council works towards, NALC, Bronze Level of the Local Council Award Scheme. Community engagement and development being areas of assessment.

APPENDIX B

Community Development Officer
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To liaise with residents and stakeholders in the community, helping to foster social inclusion, community resilience, and engagement in civic life. To include Statutory agencies for example, Somerset Council, police, health, education, housing, and those in Community, Voluntary, Faith and Social Enterprise (CVFSE) sectors. To maintain a wide network of contacts and disseminate information, and networking opportunities.

- To Contribute towards policy and delivery the aims of the council's safeguarding, equality, diversity and inclusion policies.
- To continue the development and maintaining of Chard Town's Council online directory Chard.Info. This involves continuous relationship-building and data governance to ensure the platform remains a reliable, up-to-date resource for residents and professionals.
- To attend, contribute and disseminate information from the Local Community Networks.
- To facilitate links between councillors, community representatives and outside agencies.
- To investigate funding opportunities for specific projects. To promote the Council's Grant Scheme to assist local organisations with applications, reviewing information and for successful applicants to report back to the Council.
- To engage with the Youth Service providers and to be the principal point of contact. To oversee the Youth Council.
- To contribute to the implementation of the Town Council's Community Safey Strategy, focuses on reducing crime, CCTV, preventing anti-social behaviour and fostering a secure environment through multi-agency partnership working. To be the named Police advocate.
- To empower local residents, public and voluntary agencies to raise awareness of local issues, increase community involvement in decision-making to create a Community Plan to improve physical, environmental, and social well-being.
- To engage and offer support to a range of local projects, such as Cradle to Career, Great Mead and Best Start in Life Family Hub.
- To participate in local government training in social inclusion, participatory development and resource management and further develop legislative understanding.