

## Off-site Working Policy and Procedure

### 1 Introduction

Organisations are increasingly being faced with conflicting demands to achieve greater productivity at lower cost, while remaining responsive and flexible to the working requirements of their staff and services.

Surrey Heath Borough Council recognises the need to develop more efficient working practices that serve to enhance employee performance whilst enabling them to achieve and/or maintain a good work-life balance.

The practice of off-site working offers individuals the freedom to work in an environment that is most suitable to their job role or personal circumstances, while also assisting in the realisation of organisational efficiencies.

This policy offers guidance regarding the Council's policy and procedures for implementing and reviewing working arrangements for staff that regularly spend a proportion of their contracted working hours off-site. This policy does not apply for incidences of irregular, ad-hoc off-site working or flexible working arrangements.

### 2 Scope

This Policy applies to all members of staff (including fixed term, agency staff and volunteers or work experience students) employed on Council business that have been granted off-site working arrangements on the basis of statutory or service need. This includes home, mobile and variable workers or contractors working in partnership with the Council.

This policy should be read in conjunction with the following policies:

- Statement of Terms & Conditions of Employment (*Individual*)
- Flexible Working Policy
- Health & Safety Information for Officers
- Information Security Policy
- Grievance Policy & Procedure

However, it should be noted that not all job roles are suitable for off-site working. Where normal duties are not conducive to being undertaken via an alternative working arrangement, the associated job roles are considered beyond the scope of this policy.

### 3 Policy Statement

The main purpose of the Off-site Working Policy is to provide guidelines for safe and effective working in all environments while working on behalf of

Surrey Heath Borough Council and to implement effective review procedures for managers.

## 4 Equality Assessment

Surrey Heath Borough Council promotes an adaptive and flexible approach to working for staff in all jobs and grades. Off-site working employees are entitled to the same opportunities for career development and training as office-based employees.

The application of the policy is primarily to set a framework for assessment and review of working arrangements designed to be of benefit to the operation of Council Services. However, it may also benefit individuals indirectly through permitting flexibility of working arrangements that also enhance Service delivery.

## 5 Principle and Aims

- 5.1 The direct purpose of the Off-site Working Policy is twofold:
1. To provide guidance for Council staff and managers relating to the appropriate procedure for applying for changes to existing working arrangements
- and*
2. To identify the Council's expectations of managers and all off-site working groups: home, mobile and variable workers.
- 5.2 The policy also aims to support the Council's wider aims of effective service delivery via a flexible and responsive approach to working. Construction of a basic framework that identifies types of off-site worker will help to harmonise operating procedures throughout services and facilitate provision and management of Council-provided resources.

## 6 Definitions

- 6.1 The Council recognises three categories of off-site worker (and associated working arrangements): **home worker**, **mobile worker** and **variable worker**. **N.B.** Occasional/ad-hoc homeworkers are not included in these categories and will need to book ICT equipment in advance for use at home.
- 6.2 The Council appreciates that roles may require an individual to undertake a variety of working arrangements and expects employees to adhere to the relevant policy guidance that applies in each working environment.
- E.g. For an employee that may be a variable worker;*
- *Mobile working conditions apply while performing site visits/training/client meetings*
  - *Home working conditions apply while working in their home office environment*

### 6.3 **Home worker**

Employees that spend the majority of their time working from home (and not off-site or from the office). Definition includes designated home workers and regular home workers (i.e. work from home according to a set working pattern) during their home-working shifts. Equipment may be provided by the Council dependant on their role.

### 6.4 **Mobile worker**

Employees required to undertake the majority of their duties at a variety of off-site locations; visiting partners, service users or carrying out work at various locations. Such individuals will not normally be allocated a desk in the office. Mobile workers may be provided with equipment by the Council in order for them to undertake their normal duties safely and efficiently.

### 6.5 **Variable worker**

Employees that spend the majority of their working time based at the office, but regularly require full or partial access to the Public Sector Network from multiple off-site locations in order to undertake their normal duties. This does not include ad-hoc home or off-site working.

6.6 Mobile and designated home workers will not be allocated a fixed desk in the office due to the nature of their role, but may access 'hot desk' facilities when working from the office. The relevant manager or Facilities team will advise the location of available resources. The provision of a fixed desk to variable workers will be reviewed on a case-by-case basis.

## 7 **Health & Safety**

7.1 Employers have the same obligations to ensure that off-site workers are reasonably protected from harm as apply to office-based staff. Equally, employees remain responsible for their own health and safety within their off-site or home working environment.

**N.B.** See The Health & Safety at Work etc Act 1974.

7.2 Workplace risk assessments should be undertaken prior to implementation of a new working arrangement and reviewed on a regular basis to ensure that the off-site working environment remains compliant with current health and safety legislation. Reviews will be undertaken by the Health & Safety Advisor in accordance with relevant legislation and guidelines.

7.3 Managers and employees have specific responsibilities with regards to health and safety legislation. These are outlined in the respective 'Roles and Responsibilities' sections below. **Please ensure that you understand your responsibilities** (if in doubt, seek advice from Human Resources).

## 8 **Roles and Responsibilities - Manager**

8.1 Managers **must** give all valid working arrangement change requests serious consideration and identify all practical alternatives.

- 8.2 Managers are expected to review each application to establish the extent to which the request reflects a genuine business/personal need for a change in working arrangement, taking into consideration i) the nature of job role in question, ii) the personal attributes of the employee making the request, iii) impact on the team and iv) suitability of the proposed working arrangement (i.e. timings, location, etc.).
- 8.3 Applications may be provisionally approved by managers with modifications, which must be discussed with the applicant.
- 8.4 Managers must respond to all working arrangement change applications within 14 calendar days of receipt (applications should be date stamped). If this is not practicable, the manager should contact Human Resources as soon as possible.
- 8.5 Managers are expected to conduct regular reviews of working arrangements of staff within their team, considering performance, positive/negative effect on team/service and any issues arising. If existing working arrangements do not offer continued benefit to both the employee and the service, the arrangement should be formally reviewed.
- 8.6 Ad-hoc home working arrangements should be monitored by managers in order to identify regular home working patterns as they arise. The adoption of a change to regular working pattern would necessitate a formal review of the existing working arrangement.
- 8.7 Where staff have applied for, or may be affected by a change in working arrangement, managers must engage in fair and open dialogue with employees at all stages. Guidance on the consultation process may be sought from Human Resources.
- 8.8 Managers must maintain regular contact with off-site workers in their team by phone and in person (where practicable). By remaining in frequent contact with their staff, managers will be in a better position to identify any issues arising from off-site working arrangements in addition to monitoring performance and wellbeing of the employee. In the event of potential health and safety issues, it may be appropriate for management to make a site or home visit to meet with the individual.
- 8.9 Managers must advise off-site workers of the appropriate process for notification of non-attendance or inability to undertake their duties according to the shift pattern in the event of illness, emergency etc.
- 8.10 Off-site workers must be informed regarding work-related news and issues affecting the individual and/or the team.
- 8.11 Managers must ensure that off-site working arrangements are not initiated prior to completion of an appropriate health and safety assessment (and DSE self-assessment, where appropriate) and subsequent approval by the Health & Safety Advisor.

- 8.12 If any potential risks or health and safety issues arise from the off-site working health and safety assessments then it may be necessary for a home visit from the line manager and/or Health & Safety Advisor to be arranged. For more information on the risk assessment process please contact Human Resources.
- 8.13 Managers must familiarise themselves and comply with all other relevant health & safety guidance. This may include assisting with health and safety risk assessments for designated home working employees/applicants within their team.
- 8.14 Please discuss the potential impact of proposed off-site working arrangements with the Council's Information Governance Manager before implementation. Managers must work with the employee and IT to ensure that adequate precautions are taken to maintain confidentiality of information accessed or stored in an off-site/home working environment in accordance with the Council's Information Governance Policy & Strategy, Data Protection Act 1998 and related legislation or guidelines.
- 8.15 Managers must ensure that appropriate training for off-site and home working is received by all employees that are regularly working within these environments. Please contact Human Resources (Senior Learning & Development Officer) for more information regarding suitable training courses.
- 8.16 For more information about managing off-site workers (including promoting well-being and good performance), please see ACAS guidelines on home working or seek advice from Human Resources.  
(PDF: <http://www.acas.org.uk/media/pdf/o/3/Homeworking-a-guide-for-employers-and-employees.pdf>)

## **9. Roles and Responsibilities - Employees**

- 9.1 All Council employees – regardless of their working arrangements – are required to adhere to their contractual Terms & Conditions of Employment and the Code of Conduct for Officers. However, employees must also adhere to the additional responsibilities associated with their off-site working arrangement.
- 9.2 Employees requesting home working arrangements should consider whether they have the appropriate attributes required for effective working under such conditions. It may be necessary to provide evidence or examples of how these are met to support your application. These attributes include (but are not limited to):
- Self-discipline
  - The ability to work without direct supervision
  - Good organisational skills
  - Effective time management
  - Ability to cope with potentially conflicting demands of work and family

- 9.3 Existing home workers should be aware that they do not have an automatic right to revert to office-based working. This is due to the significant costs that would have been invested to initiate home working.
- 9.4 Off-site workers must maintain an appropriate amount of contact with their line manager and colleagues. This may include regular home visits or telephone calls, the frequency of which will be established as part of the off-site working arrangement process.
- 9.5 Mobile or home workers must accept reasonable requests for visits to their home office or off-site base from their line manager or an appropriate representative of the Council for work-related purposes. Such visits may be for the purposes of:
- Delivering and collecting work
  - Encouraging open communication
  - Performance monitoring and feedback
  - Ensuring health, safety and security
  - General discussions about work-related matters
- 9.6 Off-site workers are required, on request, to attend Council sites for training purposes, performance assessment and team briefings. These meetings may occur at reasonable times outside of the employee's normal working pattern. Staff will not be reimbursed time spent on such visits as attendance is considered to constitute normal duties for Council staff.
- 9.7 Employees must undertake to take appropriate care of equipment and materials provided by the Council for the purposes of off-site working and should adhere to operating instructions and/or relevant policies and guidelines relating to their use (*e.g. for Personal Protective Equipment (PPE), see relevant sections of Health & Safety Information for Officers; Information Security Policy*).
- 9.8 Where an off-site worker leaves the Council or reverts to a predominantly office-based working arrangement, they must return all equipment supplied to them for the purposes of undertaking their duties on a mobile, variable or home working basis. All ICT resources should be returned to IT, in accordance with the Information Security Policy.
- 9.9 Employees are responsible for returning any equipment to the Council on request for the purposes of repair, maintenance and electrical testing. If this is not possible or practical, employees will be required to permit access to their premises in order for such works to be undertaken.
- 9.10 Employees must familiarise themselves and comply with all other relevant health & safety guidance. This may include permitting access to Council staff in order to undertake health and safety risk assessments for designated home working.

- 9.11 Off-site workers must cooperate with their line manager to ensure that they are working safely in off-site and home working environments.
- 9.12 Home workers must ensure that their workspace is
- Appropriate to the duties they are undertaking
  - Secure – with adequate security, storage and screening from external noise and activities
  - Adequately ventilated and lit.
- 9.13 Off-site workers must report any health and safety concerns to their line manager or Human Resources at their earliest opportunity. Additionally, any changes to their agreed off-site working environment must also be reported immediately
- 9.14 If an off-site worker injures him/herself while working off-site or in their home working environment, the incident must be reported to their line manager at the earliest opportunity and an accident form completed.
- 9.15 Home workers must not have meetings in their home with clients, customers or third parties for work purposes, or divulge their home address or home telephone number to external parties.
- 9.16 Mobile workers must comply with lone working procedures, to ensure that their whereabouts is known while undertaking their work duties.  
**N.B.** Lone working policy available here:  
<http://intranet/Community/HS/healthandsafetypolicy.htm>
- 9.17 Home workers will be required to complete a confidentiality agreement. Home working arrangements should not be initiated until a completed copy of the signed agreement has been returned to Human Resources to retain on file.
- 9.18 Employees are expected to take reasonable precautions to keep Council property and information secure. Confidential and personal data waste must be shredded or returned to the Council for proper disposal.
- 9.19 In the event of loss, theft or damage to Council equipment, employees must report the incident to ICT, Executive Head/Head of Service and/or local police (as appropriate) within 24 hours. If the incident is deemed to be the result of negligence or intentional misuse by the employee, the Council reserves the right to request the employee bear full or part responsibility for the repair costs or fair market value of the assessed equipment. If data is lost, report it to the Information Governance Manager.
- 9.20 Employees should advise their mortgage providers/landlords of their intention to initiate home working before the start date of this arrangement. The Council will not bear responsibility for any additional cost that is incurred as a result.
- 9.21 Employees should advise their home insurance providers of their intention to initiate home working before the start date of this arrangement. The Council

will not bear responsibility for any increase in premium that is incurred as a result.

- 9.22 Home workers should have suitable childcare/dependant care arrangements in place where appropriate.
- 9.23 Where an off-site worker is unable to undertake their duties according to the shift pattern agreed with their manager for any reason, they must inform their line manager (or Human Resources) as soon as possible. Notification should be in accordance with prior guidance from line managers regarding appropriate methods and times of contact for emergency incidences.
- 9.24 Please refer to the Council's House Rules for details of expectations of office-based staff, which will apply when working at Surrey Heath House.

## **10 Applying for an Off-site/Office-based Working Arrangement**

- 10.1 Applications for a change in working arrangement may arise due to organisation-led changes that warrant review of existing conditions. For example as a result of:
- i) **an organisation-led change in approach to service delivery**  
*Working arrangements are dynamic by nature and may be subject to change in order to meet new challenges and organisational operations.*
  - ii) **a role-related change in normal duties and/or responsibilities**  
*Where normal duties have been amended, employees may submit an application for off-site/on-site working to reflect this change in focus. A change in working arrangement may be granted where it is deemed to be beneficial for service delivery.*
  - iii) **concerns about suitability of current working arrangement**  
*Where performance issues or personal circumstances result in current working arrangement being unsuitable, a review may be initiated by either management or the affected employee.*
- N.B.** Changes to working arrangements require consultation with affected employees prior to being put into effect.
- 10.2 This policy does not cover flexible working requests, only role-related changes in working arrangements. For details on how to submit an application for flexible/home working due to personal reasons, see the Council's Flexible Working Policy (& Procedure).
- 10.3 The Council is not obliged to approve a request for changes to working arrangements, but is required to consider a valid request seriously. Employee requests for occasional or temporary off-site working may be declined on the basis of one or more business reasons, listed below:
- Unjustifiable cost (*e.g. supply of equipment*)
  - Detrimental impact on quality of work
  - Detrimental impact on performance
  - Detrimental effect on ability to meet customer demand
  - Inability to reorganise work among existing staff

- Inability to recruit additional staff
- Insufficiency of work during requested working periods
- Planned structural changes

**N.B.** The justifications above are bound by the Employment Rights Act 1996.

- 10.4 The Council reserves the right to provisionally accept off-site working requests with modifications.
- 10.5 Management-led proposals for changes to working arrangements may only be approved following presentation of a business case by the manager. The business case must include a cost analysis and clearly identify the benefits to the organisation (See Appendix II for template).

## **11 Termination of an Off-site/Office-based Working Arrangement**

- 11.1 Once in place, a review of the individual's working arrangements will take place on a regular basis to ensure that the working arrangements are meeting the business needs of the Council and the personal needs of the employee.
- 11.2 Under normal circumstances, at least 28 calendar days' notice will be given to the employee advising the end of the arrangement. However, in exceptional circumstances or in the event of conflicting business need this notice period may be reduced.
- 11.3 If it is the employee that wishes to end the working agreement, the 28 days' notice period will also apply. A written request (stating reasons) to amend their working arrangement must be submitted to their line manager at least 28 calendar days prior to the requested effective date.
- 11.4 The Executive/Head of Service will decide whether it is possible to accommodate the request to revert to the proposed alternative working arrangement. Where this change involves the employee becoming an office-based worker with a fixed desk, this decision will depend on advice from the Facilities team and desk availability. The service area will incur any cost associated with the transfer from off-site to office-based working arrangements.
- 11.5 **Home Workers**  
Termination of home working arrangements by managers will occur only in the event of sound business or performance-related reasons and after fully consulting the employee. Possible reasons for termination of arrangements include:
- Change in role of employee; eligibility criteria no longer met
  - Change in employee's personal circumstances resulting in home working being undesirable or impractical
  - Feedback indicating that home working arrangement has adversely affected team or service
  - Unsatisfactory employee conduct or performance.

## 11.6 **Mobile and Variable Workers**

In the event of operational emergencies or business/performance-related issues, the Council reserves the right to withdraw (temporarily or permanently) eligibility for off-site working and the employee will be required to utilise hot desk facilities instead of working off-site or from home. If appropriate, this may be enforced with immediate effect (*e.g. in cases of lack of staff cover to meet service requirements*).

## 11.7 **Office-based Workers**

In the event that a role is re-categorised to another working arrangement and this affects an employee in post, the individual will be fully consulted regarding the proposed change in working arrangements.

11.8 Where an employee has been asked to work off-site by the Council, the employee is entitled to decline the request but will be expected to provide reasons if asked.

## 12 **Hours of Work**

12.1 For existing employees, contractual hours of work will remain unchanged by subsequent working agreements unless altered by mutual consent (to be agreed by line manager). Off-site working does not automatically qualify an employee for flexible working hours or a change in working pattern

12.2 Where a line manager agrees that a home worker is not subject to fixed hours of work and free to perform the agreed work at times that suit them, the employee must still be available to respond to telephone calls or to meet with employer at specified **core hours**.

12.3 Off-site worker requests for changes in hours must be completed in the normal way as for office-based employees (see Flexible Working Policy).

12.4 Off-site workers that are contractually entitled to accrue hours under the flexi-time scheme should discuss the procedure for recording hours worked with their line manager.

12.5 Off-site workers are required to take regular adequate rest breaks in accordance with Working Time Regulations 1998. The minimum requirements for employee rest breaks are:

- At least 20 minutes break during each working day where the shift is longer than six hours
- A daily rest break of at least 11 continuous hours in each 24 hour working period (*i.e. time between finishing work on one working day and starting on the next*)
- A full day of no work each week (*this may be averaged as 2 days each period of 14 consecutive calendar days*).

## 13 **Equipment**

- 13.1 All equipment and materials necessary for off-site working will be supplied by the Council and maintained (or replaced, where necessary) by the Council. It should be noted that all equipment provided should only be used for Council business. This includes the provision of Personal Protection Equipment (PPE) and ICT resources.
- 13.2 The type of provided equipment provided to off-site workers depends on their role and which category of off-site worker they fall under. If you require clarification regarding which equipment the Council will supply for your role, please discuss with your line manager.
- 13.3 Off-site working agreements do not automatically entitle an employee to the provision of ICT equipment (e.g. laptop and peripherals). Where the employee will only work from home on a temporary or occasional basis, provision of ICT equipment may require booking out via the ICT Helpdesk (subject to Executive Head/Head of Service approval).
- 13.4 Employees with particular equipment needs will be assessed by the Health & Safety Advisor, who will advise regarding appropriate equipment to be procured.
- 13.5 Upon provision, an inventory of supplied equipment will be drawn up and signed by the employee and the manager.
- 13.6 All equipment remains the property of the Council and **must** be returned on demand. Generally the 'free return' period will extend for up to **one week** following termination of the off-site working agreement. In the event of employees leaving the Council, a deadline for return of equipment will be advised directly.
- 13.7 Any faults with Council-owned ICT equipment should be reported via the ICT Helpdesk in the usual manner. Where possible, attempts will be made to repair the fault remotely.
- 13.8 For further guidance regarding the proper use of Council ICT equipment please refer to the Information Security Policy.

## **14 Insurance & Liability**

- 14.1 Employees undertaking authorised off-site work are covered by the Council's employer's liability insurance to the same extent as office-based workers. However, the extent of the insurance will in some cases be limited by the circumstances and nature of the loss/damage incurred.
- 14.2 It is the employee's responsibility to check with relevant third parties (e.g. insurers) to ensure that they have the relevant permissions to work from home without restrictions or penalty. The Council will not be liable for any charges related to investigating or obtaining such confirmation.

## **15   Sickness**

- 15.1 In the event of being too unwell to work, off-site workers must advise their line managers at their earliest convenience. The Council's Sickness & Absence Policy and Procedure applies for all staff, including the requirement for completion of return to work interviews.

## **16   Tax & Allowances**

- 16.1 Employees working from home should be aware that this may affect their capital gains tax liability if they were to sell or otherwise dispose of their home or if they occupy a room for no other purpose than to conduct their work from home. It is recommended that the employee investigates the potential implications of home working on their personal finances prior to application or initiation of the agreement.
- 16.2 The Council will not cover any costs of heating, lighting, consumables or additional telephone costs incurred as a result of working at home. The saving in travel expenses incurred in travelling to work is deemed to cover any additional household costs.

### **Document revisions**

<b>Document revised (date)</b>	<b>Details of revisions made</b>	<b>Version</b>



APPENDIX I

# Manager-Staff Consultation Meeting Summary

## Change to Working Arrangement

*This form must be completed following consultation with employee regarding change to work arrangement application, regardless of the outcome.*

**Date of Meeting** \_\_\_\_\_

**Employee Name**  
**Job Title**  
**Team**  
**Service**


**Proposed Working Arrangement** (see *Off-site Working Policy* for definitions)

Home Worker		Variable Worker	
Mobile Worker		Office-based Worker	

**Shift Pattern**

Hours per week	
Days per week (specify)	
Core hours*	

*\* Where a line manager agrees that a home worker is not subject to fixed hours of work and free to perform the agreed work at times that suit them, the employee must still be available to respond to telephone calls or to meet with employer at specified **core hours***

**Additional Resources**

*Tick additional resources/equipment required for the proposed working arrangement.*

Personal Protection Equipment (PPE) \_\_\_\_\_

ICT Equipment \_\_\_\_\_

**Communication**

*Tick relevant methods of communication for this role:*

Home Visits		Emails	
Telephone Calls		On-site Meetings	

**In accordance with the Off-site Working Policy:**

- Managers must maintain regular contact with off-site workers in their team by phone and in person (where practicable).
- Off-site employees must maintain an appropriate amount of contact with their line manager and colleagues.

*Provide details below of what arrangements will be employed to ensure that effective communication between employee and manager is maintained.*

Employees requesting home working arrangements should consider whether they have the appropriate attributes required for effective working under such conditions. Discuss with the employee and provide supporting evidence for how they intend to manage each aspect.

- Self-discipline
- The ability to work without direct supervision
- Good organisational skills
- Effective time management
- Ability to cope with potentially conflicting demands of work and family

If home visits required, confirm date of first visit: \_\_\_\_\_

Manager approval for working arrangement granted? Yes / No

Please provide details to support your decision:

If approved, please indicate preferred effective date: \_\_\_\_\_

---

**APPROVAL**

Signature (Manager) \_\_\_\_\_ Date: \_\_\_\_\_

Signature (Executive Head) \_\_\_\_\_ Date: \_\_\_\_\_



## APPENDIX II Business Case

### Organisation-Led Change to Working Arrangement

*This form must be completed following consultation with employee regarding change to work arrangement application, regardless of the outcome.*

**1. Does the working arrangement relate to:**

- i. A new post YES / NO
- ii. An established post YES / NO

**2. Does the working arrangement affect employees in-post? (requires consultation)**

**3.**

**a. Current Working Arrangement** *(see Off-site Working Policy for definitions)*

Home Worker		Variable Worker	
Mobile Worker		Office-based Worker	

**b. Proposed Working Arrangement** *(see Off-site Working Policy for definitions)*

Home Worker		Variable Worker	
Mobile Worker		Office-based Worker	

**4. Additional Resources**

*Indicate additional resources/equipment required for the proposed working arrangement.*

- a. Personal Protection Equipment (PPE) YES / NO

*Please provide details below:*

- b. ICT Equipment YES / NO

*Please provide details below:*

5. Has a Workplace Risk Assessment been carried out? YES / NO *(please attach)*

6. What is the expected duration of the proposed arrangement? \_\_\_\_\_

**7. Business Case Assessment**

a. Benefits to organisation.

b. Risks to organisation.

c. Potential costs.

d. Other considerations.

---

**APPROVAL**

**Signature (Manager)**

Date:

**Signature (Executive Head)**

Date:

---