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## LAY EMPLOYEES - GENERAL

Approved by the Perth Diocesan Trustees

16 May 2019

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# PERTH DIOCESAN TRUSTEES POLICY 1



## 1. PREAMBLE

The Perth Diocesan Trustees (PDT) acts as the designated employer of operational / lay people working for the Anglican Diocese of Perth (ADP) and its parishes, organisations and institutions which are not separately incorporated. This policy sets out the minimum employment standards and entitlements for PDT employees, noting that there may be some variation for those employees covered specifically under modern awards.

No person will be placed on the payroll of PDT unless approval is given by the Diocesan Secretary who will require the employee to sign an approved 'Employment Agreement' setting out the terms and conditions of employment of that person.

For the purposes of this document, the Manager of a parish or the cathedral is the parish priest, rector or dean, unless otherwise stated in the Employment Agreement.

## 2. SCOPE

The policy is applicable to all lay employees or operational staff of the PDT and the Anglican Community Fund (ACF). Hereafter they will be referred to as 'employees'. Lay means a reference to a person not in Holy Orders.

This policy is administered by the Human Resources department in the ADP, hereafter referred to as HR.

The Diocesan Secretary is the delegated authority by the PDT to amend this policy and its sub-policies. PDT will review this and any sub-policies annually.

In addition to this policy, the following policies are applicable to lay employees:

Policy Number	Title
Policy 1.1	ICT Network Use
Policy 1.2	Fitness for Work
Policy 1.3	Gifts and Benefits
Policy 2	Work Health and Safety
Policy 2.1	Respect at Work
Policy 10.1 (Lay Ministers only)	Clergy and Lay Ministry Workers – Stipends and Allowances
Policy 40	Safe Ministry and Professional Standards Framework
Policy 40.1	Safe Ministry Screening and Training
Policy 40.2 (Church Workers only)	Faithfulness in Service
Policy 40.3	Child Safety and Wellbeing
Policy 41	Risk Management
Policy 42	Privacy
Policy 43A	Diocesan Archives
Policy 43B	Diocesan Archives - Retention and Disposal Schedule
Policy 44	Whistleblower
Policy 45	Accessibility

## PERTH DIOCESAN TRUSTEES POLICY 1



Policy 46	Environmental Sustainability
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The following policies are applicable to senior lay employees:

Policy Number	Title
Policy 23	PDT Delegation of Authority and Authority Limits



### **3. POLICY STATEMENTS REGARDING JOINING THE PDT**

#### **JOB CREATION**

The Diocesan Secretary and the Chief Financial Officer (CFO) are to ensure that all positions are funded within approved budgets. No positions are to be operated in an unfunded capacity. If it is necessary to create a new, unbudgeted position, the Diocesan Secretary shall seek the approval of Diocesan Council and/or The Perth Diocesan Trustees.

Parishes and Diocesan organisations and institutions which are not separately incorporated will need to ensure that relevant approvals are in place and that salary and associated employment costs can be met from the relevant budget before an Employment Agreement is issued which must be signed by the Diocesan Secretary or a delegated authority.

Positions which are created for specific tasks and/or are funded from a finite source of funding are to have a set term stipulated in the Employment Agreement.

#### **POSITION DESCRIPTION**

A position description shall be prepared for all positions. The template for these forms will be maintained by HR and approved by the Diocesan Secretary.

A copy of the relevant position description shall be issued to all new employees and a copy held on their personnel file which is to be maintained by HR.

Where changes of a permanent nature occur to the duties of a position, an amended position description shall be prepared and forwarded to HR for finalisation and approval prior to the position description being issued to the incumbent.

Position descriptions must be reviewed annually by the Manager in consultation with HR.

Position descriptions must contain as a minimum:

- Position title
- Reporting relationship
- Position purpose
- Key responsibilities
- Required qualifications
- Required experience
- Knowledge, skills and abilities

#### **RECRUITMENT**

##### **Advertising**

Advertisements to fill vacant positions shall be prepared by the Manager in consultation with HR. The use of recruitment agencies can only be approved by the Diocesan Secretary.

Parishes may work with HR if they require assistance advertising a position.

##### **Selection process**

Managers are required to work closely with HR to ensure that a robust selection process has been followed, to include: shortlisting, assignment of recruitment tasks (if required), conducting interviews, checking of references and conducting relevant medical checks.

# PERTH DIOCESAN TRUSTEES

## POLICY 1



### **Candidate Information**

Information relating to the recruitment and selection process is to be filed and stored in a safe and confidential location.

### **Equal Opportunity Employer**

The PDT is an equal opportunity employer that is committed to diversity and inclusion in the workplace. The hiring decisions will be based on qualifications, merit and operational requirements at the time.

### **APPOINTMENT**

Prior to commencing employment, all new employees must provide the following:

- a current National Police Certificate (issued within the previous 3 months)
- if working with children, a current Working with Children Check
- if they are not Australian citizens, proof of working rights for Australia

All new employees will be provided with a Fair Work Information Statement as per the national employment standards and will also be provided with an Employment Agreement which outlines the terms and conditions of employment.

All casual employees will be provided with a Casual Employment Information Statement.

The Employment Agreement shall be accompanied by the relevant position description (see Section 2 of this policy).

### **Convictions and Offences**

A condition of appointment is that candidates must provide the PDT with information about any prior convictions or offences and/or any matters that may lead to a conviction which is yet to be determined by the relevant authority.

### **Mobility**

All employees of the PDT may be required to work from various locations in accordance with operational activities.

### **INDUCTION**

It is the Manager's responsibility to ensure that new employees are provided with a thorough orientation/induction to the workplace.

### **PROBATIONARY PERIOD**

The purpose of the probationary period is to assess whether there is a good 'cultural fit' for both the employee and the employer. The probationary period is a two-way opportunity for both the employee and the employer to assess whether basic requirements of the position have been met and attributes such as personal qualities, quality of work, quantity of work, position knowledge, customer service, communication, problem solving, decision making, teamwork, ethics and behaviour are consistent with the values and philosophy of the PDT.

It is the responsibility of the Manager to ensure that the employee is provided with adequate resources and support, is thoroughly assessed during the probationary period, and is given an opportunity to develop and encouraged to provide feedback.

Three months after the employee's commencement, the employee will undergo their first structured probationary review discussion.

Prior to the end of the probationary period, the employee will undergo their six-month probationary review.

## **PERTH DIOCESAN TRUSTEES POLICY 1**

**Anglican  
Church**  
Diocese of Perth



Templates for probationary reviews are maintained by HR and approved by the Diocesan Secretary.





## **4. POLICY STATEMENTS REGARDING REMUNERATION**

### **SALARY**

The Diocesan Secretary in conjunction with Managers shall review annually the salaries of all employees taking into account the appropriate legislation, pay standards and consumer indices.

Wages for employees who are paid according to modern awards will be adjusted in line with any statutory changes to minimum wages.

The salary of the Diocesan Secretary shall be reviewed on an annual basis by the Chair of the PDT in consultation with the Diocesan Treasurer.

Employees may be eligible to sacrifice part of their salaries for items such as electronic devices/computers to be used primarily for work purposes and/or a motor vehicle, parking fees and superannuation. Any salary sacrifice arrangement must be administered in accordance with ATO requirements and, where relevant, is subject to prior approval by the Diocesan Secretary.

Prior to entering into any salary sacrifice arrangement, employees are responsible for obtaining their own independent financial advice. Employees are liable for all fringe benefit tax incurred as a result of their salary sacrifice. The PDT is not liable for any fringe benefit charges incurred by employees.

### **OVERTIME**

Due to the nature of the organisation, it is expected that some salaried employees may be required to work additional hours to carry out their duties. Additional hours should be sporadic in nature or required for a limited period of time only. If it is for longer periods, then Managers are to review their overall staffing needs to ensure working practices are effective and efficient.

### **TIME OFF IN LIEU (TOIL)**

TOIL will only be approved if an employee can demonstrate that work carried out was of an urgent nature and that prior approval from their Manager was sought before the additional work commenced. The approval will be recorded in a timesheet.

TOIL is not an additional avenue to accrue leave. Any TOIL that is approved must be used within a maximum of one month from the time of accrual unless otherwise approved by the relevant delegated authority.

### **SYNOD ATTENDANCE**

The PDT requires some employees to attend Synod. Synod usually occurs over three days on an annual basis. The PDT's requirement for an employee to attend Synod is based on final approval of the Diocesan Secretary, and where approval has been granted, the employee will be entitled to claim as TOIL equivalent time outside of the normal operational hours of the PDT.

Typically, with the Diocesan Secretary's approval, the following employee groups and/or employee locations are required to attend Synod:

- All Managers
- Identified Diocesan Office employees
- Identified Wollaston Theological College employees
- Others as required

Synod attendance for lay employees in parishes or the cathedral will be determined by the parish/the cathedral.

## **PERTH DIOCESAN TRUSTEES POLICY 1**



### **TIME RECORDING**

All casual employees, employees working on a roster or employees covered under Modern Awards must record their hours through the electronic time and attendance record keeping system. The electronic timesheet should be approved by the Manager either monthly or fortnightly, according to the employee's Employment Agreement.

### **HOURS OF WORK**

Usual hours of work for permanent or limited-term full-time or part-time employees is specified in the Employment Agreement. It is the responsibility of the Manager to notify HR for any changes to the usual rostered hours and/or days of work for permanent or limited-term full-time or part-time employees for approval by the Diocesan Secretary and amendment of the employment agreement.

Sporadic changes to hours of work can be managed between the employee and the manager through the electronic roster.

Wherever possible, subject to operational requirements, the Diocese will work with employees to achieve work/life harmony inclusive of flexible working arrangements.



## **5. POLICY STATEMENTS REGARDING LEAVE**

### **ANNUAL LEAVE**

Full-time employees are entitled to four weeks paid annual leave per year, accrued on a continuous basis. Part-time employees are entitled to paid annual leave on a pro-rata basis, proportionate to the usual hours worked.

Casual employees do not accrue annual leave. Casual employment pay rates are grossed up by an amount of 25% above the equivalent permanent rate in lieu of all leave entitlements.

Leave loading, where applicable under a Modern Award, will be incorporated into the employee's remuneration package.

Accrued leave must be cleared within 12 months from the date that it is credited unless otherwise approved by the Diocesan Secretary. If accrued leave is not cleared within 12 months, the employee will be required to submit a plan to clear the leave within an agreed timeframe.

While an employee will generally have discretion in nominating when he/she takes annual leave, the PDT may request that an employee take annual leave at a time more convenient to the operations of the parish or relevant department and/or the PDT may direct the employee to take annual leave upon PDT providing four (4) weeks' notice to the employee.

Applications for annual leave are to be approved by Managers subject to minimal disruption to operational activities.

Annual leave applications are submitted and approved via the electronic time and attendance record keeping system.

### **PUBLIC HOLIDAYS**

Full-time and part-time employees are entitled to paid leave for public holidays on the following days, or days observed in lieu, provided that they fall on a day that the employee would normally have worked:

- New Year's Day
- Australia Day
- Labour Day
- Good Friday
- Easter Sunday
- Easter Monday
- ANZAC Day
- Western Australia Day
- Sovereign's Birthday
- Christmas Day
- Boxing Day

### **PERSONAL LEAVE**

Personal leave can be taken either when an employee is unfit for work because of their own illness or injury, or to provide care or support for a member of the employee's immediate family or household, due to illness or unexpected injury.

Full-time employees are entitled to 10 days paid personal leave per year.

Part-time employees accrue personal leave on a pro-rata basis according to the number of ordinary hours worked.

Casual employees do not accrue personal leave. Casual employment pay rates are grossed up by an amount of 25% above the equivalent permanent rate in lieu of all leave entitlements.

## PERTH DIOCESAN TRUSTEES POLICY 1



Employees applying for personal leave must notify the relevant Manager as soon as practically possible, advising them of the expected period of absence.

Employees are required to provide a Medical Certificate or a Statutory Declaration for all periods of personal leave comprising of two days or more, or, where repeated single day absences occur, as otherwise instructed by the PDT.

Personal leave applications are submitted and approved via the electronic time and attendance record keeping system.

### PARENTAL LEAVE

#### Unpaid Parental Leave

A full-time or part-time employee, with at least 12 months continuous service, is entitled to take up to 12 months of unpaid leave that is associated either with the birth of a child to the employee or their partner, or with the placement of a child under 16 with the employee for adoption.

In either case, the employee must have a responsibility for the care of the child (*Fair Work Act s70*). The employee must inform their Manager of their intention to take leave, giving at least 10 weeks' notice unless it is not practicable to do so.

An employee who has already taken 12 months leave can request a further 12 months leave, provided their partner has not already taken that amount of leave. The request for extension will be via a written notice of the extension at least 4 weeks before the end of the available leave period, and will specify any amount of unpaid parental leave that the other member of the employee couple has taken, or will have taken, in relation to the child.

In the case of a pregnant employee, an employee may be requested to commence unpaid parental leave up to 6 weeks before the expected date of birth if it is believed that there is a risk to the employee in working in their present circumstances. If an employee chooses to continue working during those 6 weeks, a medical certificate may be required to demonstrate evidence of fitness for work. If no such evidence is supplied, and no safe alternative is available, the PDT will request the Employee to commence leave.

On completing a period of unpaid parental leave, an employee is entitled to return to their pre-parental leave position. If that position no longer exists, the employee is entitled to return to an available position for which the employee is qualified and suited which is nearest in status and remuneration to the employee's pre-parental leave position.

#### Paid Parental Leave

Employees who have been identified as the primary caregiver of a newborn or adopted child may be eligible for up to 18 weeks paid parental leave, in the form of a Government payment based on the minimum wage, as stated in *Paid Parental Leave Act 2010*.

It is the employee's responsibility to make the necessary enquiry about their eligibility and to apply.

### COMPASSIONATE LEAVE

Paid Compassionate leave will be given for a period up to 2 days (per occasion) for the purpose of:

- Spending time with a member of the employee's immediate family or household, who has sustained a life-threatening injury or illness.
- Upon the death of a member of the employee's immediate family or household.
- A child is stillborn, where the child would have been a member of the employee's immediate family or the employee's household, if the child had been born alive
- The employee, or the employee's spouse or de facto partner, has a miscarriage.

## PERTH DIOCESAN TRUSTEES POLICY 1



For the purpose of compassionate leave, a member of an employee's immediate family or household is:

- A spouse, de facto partner, child, parent, grandparent, grandchild or sibling of the employee
- A child, parent, grandparent, grandchild or sibling of a spouse or de facto partner of the employee,
- Any other person who immediately before that person's death lived with the employee as a member of the employee's family.

Claims for compassionate leave in excess of 5 days per annum may, with approval, be taken as another form of paid or unpaid leave. Compassionate leave is not cumulative.

The two days' compassionate leave need not be consecutive.

Applications for compassionate leave are submitted and approved via the electronic time and attendance record keeping system.

### LONG SERVICE LEAVE

Employees are provided 8 and 2/3 long service weeks leave after the completion of 10 years' continuous service, in accordance with the *Long Service Leave Act 1958*.

Payment in lieu of long service leave is available on a pro-rata basis upon the termination of employment by death or any circumstances other than serious misconduct after seven years' continuous service.

### COMMUNITY SERVICE LEAVE

An employee may be entitled to:

- Unpaid leave for any reasonable absence associated with voluntary emergency management activities
- Military leave (army, air force, navy)
- Leave for jury service/duty.

Applications for community service leave are submitted and approved via the electronic time and attendance record keeping system.

A full-time or part-time employee who is required to serve with the military reserves, on presentation to the employer of the required period of service to be undertaken with the military, including all relevant documentation, the employee will be granted leave of absence.

A full-time or part-time employee who is required to serve on a jury during his/her ordinary working hours shall, on presentation to the employer of the summons to serve, be granted leave of absence on full pay for the period that the employee is empanelled as a member of a jury or is required to attend at court in the response to the summons to serve.

Any payment received by an employee for jury duty shall be paid to the employer or deducted from the employee's salary.

### LEAVE WITHOUT PAY

The PDT may grant a full-time or part-time employee leave of absence without pay for a period of up to 12 months provided that:

- All other leave credits are exhausted.
- Leave is deemed possible with regard to business and operational requirements.

## **PERTH DIOCESAN TRUSTEES POLICY 1**



Applications for leave without pay are to be submitted to the Diocesan Secretary for approval accompanied by a memorandum from the employee's Manager detailing the rationale for the leave without pay request. If approved, the relevant documentation is to be forwarded to HR.

### **STUDY LEAVE**

An employee, with 12 months or more continuous service, may apply for up to 5 hours paid study leave a week (up to 200 hours per year) to study for a Diploma, Degree or Post Graduate qualification conducted by a university, TAFE college, professional association or other recognised training provider.

Approval will be subject to:

- The course being judged relevant to the employee's own area of work
- The employee undertaking an equivalent formal study load in the employee's own time;
- The employee providing proof of satisfactory academic progress.

Applications for study leave are to be submitted to the Diocesan Secretary for approval accompanied by a memorandum from the employee's Manager detailing the rationale for the request. If approved, the relevant documentation is to be forwarded to HR.

### **RESEARCH LEAVE**

This leave type is applicable to research-active academic staff in Wollaston Theological College (the College).

Employees can apply for twelve (12) weeks paid research leave every five (5) years. This means that they will be relieved from teaching duties during this time but will be paid their usual pay. The leave can be taken adjacent to four (4) weeks of annual leave, to be away from the College for up to sixteen (16) weeks, unless otherwise approved by the Warden.

Applications for research leave should be submitted to the Warden for approval. The application form will state specific research objectives for the period of leave. The Warden is to consult with the Archbishop and Diocesan Secretary before confirming the leave with the employee.

On completion of the research leave, the staff would submit a report on the study and how the objectives had been met.

Research leave is not cumulative and will not be paid out at the end of employment.

### **FAMILY AND DOMESTIC VIOLENCE LEAVE**

All employees (permanent and casual) are entitled to 10 days paid leave each year to address family matters that may have resulted in domestic violence and/or family violence. Family and domestic violence means threatening or other abusive behaviour by an employee's close relative that seeks to coerce or control a person and/or who causes a person harm or fear. A close relative is an employee's:

- Spouse or former spouse
- De-facto partner or former de-facto partner
- Child (to include stepchild or adopted child)
- Parent
- Grandparent
- Grandchild
- Sibling
- Is related to the employee according to Aboriginal and Torres Strait Islander kinship rules.

## **PERTH DIOCESAN TRUSTEES POLICY 1**



This leave is available to employees in full at the start of each 12-month period of their employment and it does not accumulate from year to year. It can be taken in a single continuous period or in separate periods.

PDT is committed to supporting employees who are experiencing family and domestic violence and understands the confidentiality and the privacy requirements in such circumstances. Employees who require family and domestic violence leave can apply by notifying their Manager, a colleague they can trust or HR. The Manager or employee's colleague must notify HR as soon as possible. HR will work closely with the employee and/or colleague to ensure discretion in managing the employee absence.



## **6. POLICY STATEMENTS REGARDING STANDARDS OF CONDUCT**

### **ATTITUDE, BEHAVIOUR AND CONDUCT IN THE WORKPLACE**

Employees must behave respectfully towards fellow colleagues, customers, guests, students, volunteers and members of the public whilst at work.

Rudeness will not be permitted. Objectionable or insulting behaviour or bad language may result in disciplinary action up to and including termination.

Employees must conduct themselves in accordance with the highest personal standards at all times in a way which is consistent with the values of the Anglican Church. Employees of the Anglican Diocese of Perth are committed to truthfulness, honesty, generosity, and selflessness. They possess empathy for and recognition of the importance of faith in people's lives and are enablers of the Diocese's mission. Employees must conduct themselves in a manner which reflects our commitment to a workplace that is inclusive and free from bullying and harassment.

The Anglican Diocese of Perth is committed to providing a safe and secure environment for all its members and leaders, customers, guests, volunteers and students, and especially children and vulnerable persons. Employees working with children or young people must act in the best interests of children and young people to maintain their safety and wellbeing.

Employees must use best endeavours to promote the interests of the PDT and shall, during normal working hours, devote the whole of their time, attention and abilities to the PDT and its affairs.

Any involvement in an activity which could be construed as being in competition with the PDT is not allowed.

### **CONFLICT OF INTEREST**

An employee may not be involved, employed or engaged in any activity which may be or is likely to create a conflict of interest unless expressly permitted by the PDT.

The PDT may take whatever action it determines appropriate to avoid an actual or potential conflict of interest.

Such action may include transfers, reassignments, change of shifts/roster patterns, or, where the PDT deems such action appropriate, termination of employment.

### **WASTAGE**

The PDT strives for minimum waste, which is essential to the cost-effective and efficient running of the business of the PDT. Employees must promote this policy by taking care during normal duties to avoid unnecessary or extravagant use of services, time, energy, etc. The following points are illustrations of this:

- handling machines, equipment and stock with care
- turning off any unnecessary lighting and heating
- keeping doors closed whenever possible
- double side printing, including re-using scrap paper, where possible
- asking for other work if a job has come to a standstill and
- starting with the minimum of delay after arriving for work and after breaks

Any damage to vehicles, stock or property (including non-statutory safety equipment) that is the result of an employee's carelessness, negligence or deliberate vandalism will render the employee liable to pay the full or part of the cost of repair or replacement at the discretion of the PDT, and subject to any statutory or Award restrictions in this respect.



## **PERTH DIOCESAN TRUSTEES POLICY 1**



Any loss to the PDT that is the result of an employee's failure to observe rules, procedures or instruction, or is as a result of an employee's negligent behaviour or unsatisfactory standards of work, will render the employee liable to reimburse to the PDT the full or part of the cost of the loss, subject to any statutory or Award restrictions in this respect.

In the event of an "at-fault" accident whilst driving one of the PDT vehicles you may be required to pay the cost of the insurance excess, subject to any statutory or Award restrictions in this respect.

### **DRESS AND APPEARANCE**

Consistent with the culture of the PDT, employees are expected to present a professional image with regard to appearance and standards of dress and to maintain excellent standards of personal hygiene at all times.

Personal protective equipment (PPE) and clothing may be issued for an employee's protection because of the nature of the job and if issued must be worn and used at all appropriate times. Failure to do so could be a contravention of health and safety responsibilities. Once issued, this protective wear/equipment is the responsibility of the employee.

Visible tattoos and piercings are permitted; however, an employee may be directed by the PDT to cover any tattoos deemed to potentially be offensive and/or remove any visible piercings if they pose a possible risk to health and safety whilst at work.

At the cessation of employment, an employee must return any uniform and personal protective equipment that was issued.

If an employee arrives for work in a manner that does not comply with this policy, the Manager will advise the employee that they are not dressed or groomed appropriately to perform duties. As a result, the employee may be sent home to change with any resulting lost time being recorded as unpaid leave.

Inappropriate presentation consists of:

- Revealing clothing
- Inappropriate or offensive clothing and/or inappropriate or offensive wording on clothing
- Excessive scruffy and torn clothing
- Inappropriate footwear for your duties
- Lack of PPE
- Bare footed within a working environment
- Unpleasant body odour

Any deliberate or persistent breaches of this policy may result in disciplinary action being taken against the employee.

### **FAMILY AND FRIENDS IN THE WORKPLACE**

Friends and family must not be in the workplace, unless approved in advance by your Manager, due to an emergency, or for genuine business reasons. It is the employee's responsibility to ensure that friends and family are not in the workplace for longer than necessary and whilst in the workplace they should be accompanied at all times.

### **EMPLOYEE PERSONAL PROPERTY**

The PDT does not accept liability for any loss of, or damage to, property that an employee brings onto PDT premises. Employees should not leave personal items of value into the workplace unattended

# PERTH DIOCESAN TRUSTEES

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### HOUSEKEEPING GENERALLY

It is responsibility of all employees to ensure that the general/communal work areas/environment are kept in a tidy, presentable and professional condition at all times; this is inclusive of personal work areas (desks, rooms, offices, etc.) to be free from items that may cause concern and/or distress for others.

### PROTOCOL FOR MEDIA CONTACT

The PDT's protocol for approving employee contact with the media is limited to the following:

- Archbishop
- Diocesan Secretary

Any employee who receives contact from the media and/or who intends to contact the media is **ONLY** permitted to do so with the express prior approval of the Archbishop or Diocesan Secretary. When seeking approval, you must provide sufficient written information in order to inform the Archbishop or the Diocesan Secretary of your rationale. Your written information must contain the following:

- Specify reason
- Specify outcome
- Specify risks to the PDT (if any)
- Specify target audience

Requests will be approved or declined in writing.

Parish based employees must only contact or engage with the media with their Manager's express permission and on matters only relating to the ministry of the parish or the cathedral.

### CONVICTIONS AND OFFENCES

An employee must immediately report to the PDT any conviction or offence with which they may potentially be charged or have been charged.

Employees are required to renew the National Police Certificate (NPC) every three years. Failure to do so may lead to a disciplinary action.

Employees working with children must maintain their Working with Children Checks current and carry the cards when they are on duty.

### SURVEILLANCE

Surveillance may be conducted in the PDT workplace, and may be conducted using:

- Internet usage recording devices, such as data capture, web browsing and email history captured on servers, and keystroke recognition
- any form of visual recording devices including all types of camera, such as CCTV cameras
- any form of audio recording devices.

Surveillance is to ensure the security, safety, health and wellbeing of employees, volunteers, representatives and visitors. Surveillance is also used to secure and safeguard property.

Surveillance may be conducted at any time and any employee/representative may be subject to surveillance.

Surveillance may be continuous or intermittent at the PDT's discretion.

The PDT may, at its discretion, disclose surveillance records for any reason that is not barred by privacy legislation and/or the PDT may disclose surveillance records to an appropriate authority (i.e., the police).

Employees may consult with the PDT regarding any concerns about the PDT's surveillance.

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Cameras will be visible and recording devices (including cameras) will not be placed in bathrooms or change rooms.

In extreme circumstances, the PDT reserves the right to review and use CCTV, recording devices and any other device when considering disciplinary proceedings. Any person subject to disciplinary proceedings will be informed of any device used by the PDT to establish whether disciplinary action is to be taken, and that person will be given the opportunity to review the device(s) containing information about them during the disciplinary process.



## **7. POLICY STATEMENTS REGARDING TRAINING AND DEVELOPMENT**

### **TRAINING NEEDS IDENTIFICATION**

Training and developmental needs of employees will initially be identified at the end of an employee's probationary review and via the Annual Performance Appraisal process. Managers are required to collate training needs of employees and provide that information to HR.

HR will develop an Annual Training Calendar that identifies scheduled, approved and funded training for employees and this information will be made available to Managers.

Training of parish-based employees is determined at the discretion of their Manager and the Parish Council.

### **STUDY ASSISTANCE**

The PDT recognises that its greatest asset are its employees, and therefore as an employment retention strategy, employees are encouraged to undertake self-development training in order to build their capacity and contribution to the PDT. In return, the PDT will consider providing study assistance to employees upon written request to the Diocesan Secretary including formal confirmation of the unit(s) of study.

Any request for study assistance and/or financial contribution will require the employee to sign a Training Agreement with the PDT and the area of study must be within the employee's comparable area of work.

The Diocesan Secretary will approve or decline study assistance requests.

Study assistance of parish-based employees is determined at the discretion of their Manager and the Parish Council.



## **8. POLICY STATEMENTS REGARDING PERFORMANCE AND DISCIPLINE**

### **GENERAL POLICY STATEMENTS REGARDING PERFORMANCE AND DISCIPLINE**

This policy statement sets standards of performance and behaviour expected by the PDT, together with the procedure to be followed in the event of disciplinary issues. The policy promotes equitable treatment of individuals and it is the PDT's aim that the policy and procedures emphasise and encourage improvement in the conduct of individuals where they fail to meet the required standards. The policy and procedures should not be seen as a means of punishment.

The PDT reserves the right to amend the policy and procedures where appropriate.

Under this policy and procedure, the '*principles of natural justice*' will be applied. The employee will be given an opportunity to respond to any matters put before them, and in doing so, the employee will be offered an opportunity to liaise with a support person of their choice.

To enable the PDT to verify the facts, the process within which this occurs is to establish whether an employee's attitude, behaviour, conduct and/or performance will proceed to an investigation. In the event that the matter proceeds to an investigation, the PDT may require some or all of the below:

- establish and identify the issue(s) at hand
- remind all parties of the need to maintain confidentiality throughout this process
- information will be documented and presented in writing for the employee/party(ies) to respond
- outcomes may range from 'formal written caution', 'first written warning', 'second written warning' or 'final written warning'.
- for matters of considerable concern, the PDT reserve the right to vary the range of action into a singular outcome commensurate with the disciplinary matter.

### **UNSATISFACTORY CONDUCT / PERFORMANCE**

An employee may be subjected to disciplinary action if they are found to have acted in any of the following ways which would be considered to have contravened this policy and procedure (the below is not an exhaustive list):

- unsatisfactory standards or output of work
- failure to abide by the PDT's policies and procedures and general work instructions
- failure to report immediately to the PDT any conviction, or summons which may lead to a conviction
- actions which could threaten the health, safety and wellbeing of others
- persistent absenteeism and/or lateness
- rudeness towards Managers, members of the public or your colleagues, objectionable or insulting behaviour, harassment, bullying or bad language
- failure to devote the whole of time, attention and abilities to PDT business and its affairs during normal working hours
- unauthorised use of email, internet and/or social media
- use of PDT vehicles without approval or authorisation, or a current and valid driver's licence for that class of vehicle
- failure to report any accident, incident and/or near miss (whether or not personal injury or vehicle damage occurs) whilst driving a PDT vehicle or whilst driving your personal vehicle for work-related matters
- carrying unauthorised goods or passengers in PDT vehicles or the use of PDT vehicles for personal gain
- unauthorised use or negligent damage or loss of PDT property and

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- failure to report immediately to the PDT any damage to PDT property or premises.

### SERIOUS MISCONDUCT

Serious misconduct may be as a result of an employee's attitude, behaviour, conduct, performance and/or negligence. Any act of serious misconduct may constitute a fundamental breach of an employee's Employment Agreement and may give grounds for the PDT to terminate the employee's Employment Agreement. The PDT values trust and confidence in all employees to carry out their lawful duties in a manner that is consistent with the 'values of the PDT' ensuring that relationships remain healthy, professional, respectful and supportive.

Examples of the types of matters that may constitute an act of serious misconduct may include the following:

- theft
- fraud
- physical violence
- bullying
- inappropriate use of social media
- inappropriate use of PDT property
- deliberate and wilful damage to property
- acts of unlawful discrimination and/or harassment
- acts of sexual harassment
- breach of confidentiality
- possession, or being under the influence, of illegal drugs at work and
- breach of the PDT policies, procedures, work instructions, reputation and/or good standing.

### DISCIPLINARY PROCEDURES

It is the responsibility of the Diocesan Secretary to ensure that this procedure meets all current legislative and organisational requirements.

It is the responsibility of Managers to ensure that all employees understand and have the resources to execute this procedure and that:

- They are aware of the PDT's Performance Management Policies and Procedures, and that they follow them accordingly.
- They conduct performance management procedures in consultation with Human Resources.
- They conduct performance management procedures in a fair and respectful manner whilst operating in good faith.

It is the responsibility of the Human Resources to ensure that:

- Managers and employees are provided with support, consultation and accurate information in relation to performance management matters.
- They are aware of the PDT's Performance Management Policies and Procedures, and that they follow them accordingly.
- They participate in performance management procedures in a fair and respectful manner whilst operating in good faith.

PDT employees have a responsibility to follow this procedure and that:

- They are aware of the PDT's Performance Management Policies and Procedures, and that they follow them accordingly.
- They cooperate and respond to performance management procedures in an honest and respectful manner.

## PERTH DIOCESAN TRUSTEES POLICY 1



- They carry out their work to the best of their ability ensuring good performance, good attitude, good behaviour and good conduct at all times.

### PERFORMANCE COUNSELLING

Performance counselling is a collaborative process whereby the Manager and employee work to solve a performance, attitude, behaviour and / or conduct problem together. Performance counselling involves:

- Defining the problem;
- Determining what is causing / has caused the problem;
- Solving the problem; and
- Formulating an action plan.

Where a performance or conduct issue has been identified by the employee's Manager - the Manager is to address this via an informal discussion with the employee. Where after an informal discussion there has been no correction in the employee's performance, attitude, behaviour and / or conduct; the following process is to take place.

The PDT retains discretion in respect of disciplinary action to be taken. Action taken will identify the rationale for discipline following the below sequence:

- **Situation** – reason for addressing a matter(s) with an employee
- **Response** – detailed information received from the employee about the matter(s)
- **Previous history** – determine whether prior matter(s) are related to the present matter(s)
- **Propensity** – likelihood of similar matters occurring in the future
- **Workplace health and safety** – consider risk(s) to the health, safety and wellbeing of others
- **Reputation** – consider risk(s) to the reputation and/or good standing of the PDT

The PDT will make a determination on any acts of discipline to be issued to an employee based primarily on the above and/or for any other reason.

The Diocesan Secretary and/or delegated authority are the only parties authorised to issue formal written disciplinary outcomes.

### RAISE A PERFORMANCE / CONDUCT ISSUE

The Manager is to approach the employee in a professional and respectful manner to make a time to meet to discuss the performance, attitude, behaviour and / or conduct issue(s) with the employee. The Manager is to inform the employee of items to be discussed at the meeting and advise the employee that it will be a performance counselling meeting.

### CONDUCTING THE PERFORMANCE COUNSELLING MEETING

The Manager is to ensure that the employee understands their duties and has the resources, skills and tools to perform the job. The employee may find it helpful if the Manager takes them through the employee's Position Description as a tool to assist the employee to understand the area(s) for improvement. The Manager is required to provide clear examples and / or evidence demonstrating that the employee's performance / conduct is unsatisfactory and / or is questionable.

The employee must be given an opportunity to respond to the issues raised. Appropriate performance, attitude, behaviour and / or conduct standard(s) are to be set by the Manager and an action plan developed to assist the employee to meet the required standards.

A timeframe of no more than four (4) weeks is to be provided by the Manager before a review of the performance, attitude, behaviour and / or conduct and action plan is to take place.

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The Manager is to record the outcome of the performance counselling meeting, including the action plan and provide a copy to the employee and to Human Resources.

### **REVIEWING THE PERFORMANCE OF THE EMPLOYEE**

After conducting the performance counselling meeting, the Manager will monitor the employee's performance, attitude, behaviour and / or conduct in order to determine whether the action plan is being adhered to.

When conducting a review of the performance, attitude, behaviour and / or conduct of the employee, the Manager is to ensure that the employee has access to the required tools, resources and training required in order to assist them to meet the set standard(s).

Where performance, attitude, behaviour and / or conduct standards are being met, the performance counselling process will be finalised by the Manager by informing the employee in writing. A copy of this is to be provided to Human Resources.

Where performance, attitude, behaviour and / or conduct standards are not being met, the Manager is to follow the below:

- Set another review date and continue to review the performance, attitude, behaviour and / or conduct of the employee. The new review date is to be no longer than four (4) weeks after the first review date.
- Determine if any further assistance, training or resources are required for the employee to meet the set standard(s).
- Determine if any non-work-related factors are affecting the employee's performance, attitude, behaviour and / or conduct and (where appropriate) refer the employee to PDT's Employee Assistance Program.

If the performance, attitude, behaviour and / or conduct of the employee does not improve following the second review and after providing assistance, the Manager is to inform the employee that the matter will escalate to disciplinary action.

### **DISCIPLINARY ACTION**

Disciplinary action follows the performance counselling process when the employee's performance, attitude, behaviour or conduct has not been corrected within the set timeframes.

The employee is to be given a formal written notification of the deficiencies in their performance, attitude, behaviour and / or conduct. The employee is entitled to '*procedural fairness and natural justice*' and the employee is entitled to:

- Know exactly what is expected of them;
- Know when and how they are not meeting the required expectations;
- Know the consequences should they fail to improve; and
- Consequences that are fair, just and reasonable.

### **PRIOR TO CONDUCTING A DISCIPLINARY ACTION MEETING**

The Manager is to notify the employee of the concern(s) and arrange an appointment at a time and place suitable for conducting the meeting. The employee is entitled to have a support person present at the meeting. Prior to the meeting, the Manager is to advise the employee of all persons who will be present at the meeting. If required, a Human Resource representative may be present. The Manager is also to advise the employee (prior to the meeting) of the agenda of items that will be discussed. This is to clearly state what standards are not being met along with specific examples.





## **CONDUCTING A DISCIPLINARY ACTION MEETING**

During the meeting, the Manager is to communicate specific details and examples of the employee's performance, attitude, behaviour and / or conduct that have not met the required standard.

The employee is to be given the opportunity to respond to each allegation / performance issue. Careful consideration must be given to the employee's response in order to determine if their response is acceptable.

If it is agreed that the employee's response is satisfactory and justify the performance / conduct, the Manager and Human Resources are to inform the employee and end the meeting. Human Resources will issue a letter confirming the outcome of the meeting.

Where it is deemed that the responses were not satisfactory and do not justify the performance / conduct, the Manager and Human Resources are to notify the employee:

- Their response does not justify their performance, attitude, behaviour and / or conduct.
- What they need to do in order to improve their performance, attitude, behaviour and / or conduct so as to meet the standards acceptable by the PDT.
- Their performance, attitude, behaviour and / or conduct will be closely monitored and formally reviewed after 2-weeks.
- Their employment with the PDT may be terminated if their performance, attitude, behaviour and / or conduct does not improve to meet the required standard(s).

## **ISSUING A FORMAL WRITTEN WARNING**

Managers **MUST** consult with Human Resources in order to obtain a formal written warning letter to issue to their employee. Managers are not permitted to prepare written warning letters.

A formal written warning approved by the Diocesan Secretary is to be issued where the following occurs (the below is not a prescriptive list):

- Performance counselling, followed by disciplinary action with an employee has not resulted in an improvement in performance, attitude, behaviour and / or conduct or the meeting of set standard(s);
- The occurrence of a serious and wilful misdemeanour;
- Persistent performance deficiencies;
- Breach of policy;
- Or other matter(s) at the discretion of the relevant delegated authority.

## **INVESTIGATION OF MISCONDUCT / SERIOUS MISCONDUCT**

The Manager in consultation with Human Resources is to commence an investigation as soon as the misconduct is identified.

The employee may be suspended with pay while an investigation is being conducted. The Manager is to notify the employee that:

- The PDT will be investigating an act of misconduct and / or serious misconduct.
- There will be an opportunity to respond once the preliminary fact-find is complete, and
- They have been suspended on full pay and are not required to attend the workplace until further notice.

Due to the fact that each investigation may be different, the Manager is to seek advice from Human Resources regarding the investigation process relating to the matter to be investigated.



## **9. POLICY STATEMENTS REGARDING WORKPLACE GRIEVANCES**

The Perth Diocesan Trustees (PDT) are committed to a healthy and safe workplace and will contribute to this by taking a positive duty towards the effective management of grievances between employees and the people they come into contact with, in the workplace.

The procedures for managing grievances are contained in the Respect at Work Policy.

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### **10. POLICY STATEMENTS REGARDING GENERAL HARASSMENT, SEXUAL HARASSMENT, SEX-BASED DISCRIMINATION AND BULLYING**

The Perth Diocesan Trustees (PDT) are committed to a healthy and safe workplace and will contribute to this by taking a positive duty towards eliminating and preventing general harassment, sexual harassment, sex-based discrimination and bullying (unlawful conduct).

The procedures for eliminating and preventing unlawful conduct are contained in the Respect at Work Policy.



## **11. POLICY STATEMENTS REGARDING WORKING REMOTELY**

The PDT supports flexible work practices to assist employees to balance their work and personal lives.

This policy contains the PDT position on home-based work and to outline the underlying principles of home-based work, setting out entitlements, eligibility criteria, how applications for home-based work will be dealt with, and other conditions that apply. This policy does not apply to work from home ad-hoc arrangements.

### **DEFINITIONS**

*“Home-based work”* is an arrangement that allows employees to regularly perform ordinary hours of duty at their home-based work site.

*“Home-based work site”* is the employee’s private dwelling.

*“Office based site”* is the location where the employee would ordinarily work if there were no home-based work arrangement.

*“Work from home”* is an ad-hoc arrangement that is irregular and considered to be a one-off.

### **MAKING A REQUEST FOR A HOME-BASED WORK ARRANGEMENT**

Employees who wish to request a home-based work arrangement are required to submit a written request to their Manager outlining:

- The reason(s) for requesting a home-based work arrangement;
- The proposed days and hours per week to be worked at the home-based work site;
- The proposed duration of the home-based work arrangement;
- The suitability of the employee’s personal computer/laptop for remote access work, including the adequacy of virus protection, firewall protection and speed of internet service provider;
- The personal characteristics that the employee possesses which would allow them to work productively in a home-based work arrangement.

### **ELIGIBILITY**

Requests for home-based work arrangements are considered on a case-by-case basis. Requests to enter into a home-based work arrangement will be considered on merit, taking into account the operational needs of the PDT.

Some of the matters that will be taken into account when considering an employee’s request to conduct home-based work include (but are not limited to):

- The nature of the work and its suitability to a home-based work arrangement;
- The employee’s reasons for requesting a home-based work arrangement;
- The characteristics of the employee and whether they would be suitable for a home-based work arrangement (e.g., ability to work autonomously, time management skills, motivation levels);
- Impact on other colleagues, particularly on workloads;
- Potential positive and/or negative effects on the quality of the PDT’s processes, practices and outcomes;
- The employee’s level of direct client face-to-face contact; and
- The suitability of the employee’s personal computer/laptop for remote access work, including the adequacy of virus protection, firewall protection and speed of internet service provider.

It should be noted that an employee’s personal reasons for requesting a home-based work arrangement will not be grounds in themselves for either approving or rejecting a home-based work request.

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Once the Manager has considered the merits of an employee's home-based work request, they will provide a written response to the employee stating if the request has been successful and the reasons for their decision.

If the home-based work request has been approved, a Home-based Work Deed will be provided to the employee outlining:

- The duration of the home-based work arrangement and date that the agreement will be reviewed;
- Nominated days and hours per week to be worked at the home-based work site; and

### **WORK PLAN**

The Manager is to develop with the employee an agreed work plan which must be in place prior to the commencement of a home-based work arrangement. As a minimum, the work plan will include details of:

- work that will be completed;
- expected standards of work and performance indicators; and
- timeframes in which work should be completed at the home-based work site.

### **COMMUNICATION REQUIREMENTS**

Good communication is an essential part of any successful home-based work arrangement. Each party has specific requirements when it comes to ensuring appropriate levels of communication are maintained throughout the duration of the home-based work arrangement.

It is the responsibility of the employee's Manager to:

- Ensure that the employee knows and understands the expectations and required standard of work;
- Meet with the employee at regular intervals (at least fortnightly) to provide/gain regular feedback and to discuss and evaluate the home-based work arrangement; and
- Provide the employee with all information concerning internal meetings, training and other career development opportunities available to other employees.

It is the responsibility of the employee to:

- Remain contactable at all times during the periods in which home-based work is carried out and available for communication with the other employees as agreed;
- Communicate any problems or issues to their Manager as soon as possible; and
- Ensure that they have completed the required hours of work each day.

### **SECURITY**

All Information Technology and computer use policies which apply at the employee's usual place of work shall also apply when carrying out home-based work at the home-based work site.

In particular, the employee engaged in a home-based work arrangement is responsible for:

- Ensuring that anti-virus controls are in place, up to date, configured properly and operating (the PDT's IT provider may provide advice on setting up firewalls and anti-virus software, however, it is the responsibility of the user to ensure this is done properly);
- Ensuring that equipment and media is not left unattended in public places;
- Ensuring portable computers contain appropriate forms of protection such as passwords;
- Storing information and documents related to their work with the PDT directly on the PDT server and not on a personal computer;
- Reporting security breaches to the PDT's IT provider as soon as possible; and

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- Using work e-mail address and not communicating via private e-mail etc.

### **EQUIPMENT AND SUPPLIES**

The PDT will provide the employee with equipment and supplies essential to performing the agreed duties at the home-based work site (e.g., paper, pens, etc.), or will reimburse the employee for such purchases.

The PDT will not provide furniture such as a bookcase, desk, lamp, chair, etc or meet the costs of installing an additional phone line/internet or consumables such as first aid kit. The PDT expects an employee requesting a home-based work arrangement to provide such furniture, lighting, etc. to ensure an ergonomically safe work environment at the home-based work site.

It is the employee's responsibility to assess the personal implications of commencing home-based work with respect to taxation, insurance or leasing arrangements.

### **TELEPHONE CALLS AND OTHER EXPENSES**

Where employees have PDT provided mobile phones, they are encouraged to use their PDT provided mobile phone for all work-related telephone calls made at the home-based work site. The PDT will not pay for costs such as heating, lighting, electricity, gas, water, rent or wear and tear or to pay telephone, internet or other home office costs.

### **MODIFYING OR TERMINATING A WORK AT HOME ARRANGEMENT**

A home-based work arrangement may be modified at the request of the employee's Manager, the Diocesan Secretary or the employee. Any modifications to the home-based work arrangement must be recorded in writing and agreed to by the other party.

A review of the home-based work arrangement will be undertaken on a regular basis by the employee's Manager and the employee on the review date indicated in the home-based work agreement.

The home-based work arrangement may be terminated at the request of the Manager, Diocesan Secretary or the employee. The arrangement may be terminated due to:

- Operational requirements with reasonable notice;
- Grounds of inefficiency of the arrangements;
- Failure to comply with Work Health and Safety or security arrangements;
- Any other grounds deemed necessary or appropriate.

### **CONSEQUENCES OF BREACH OF THE POLICY**

Disciplinary action, up to and including termination of employment, may be taken against an employee in the event that a breach of this policy occurs.

### **WORKING FROM HOME SELF-ASSESSMENT CHECKLIST**

This Checklist (See Lay Employee Form 2 – Working From Home Self-Assessment Checklist) is to assess and certify that the home-based work site conforms to acceptable work health and safety standards.



## **12. POLICY STATEMENTS REGARDING MOTOR VEHICLES**

### **GENERAL REQUIREMENTS**

Employees may be required to use a motor vehicle to enable them to efficiently perform their duties. Where travelling in the course of duties, the motor vehicle is considered to be a workplace and the PDT recognises that it has health and safety obligations in respect of this.

### **EMPLOYER RESPONSIBILITIES**

The PDT will ensure that:

- PDT motor vehicles are registered
- PDT motor vehicles are insured
- PDT motor vehicles are regularly serviced and maintained

### **EMPLOYEE RESPONSIBILITIES**

Employees are responsible for ensuring compliance with *Road Traffic Act 1974* and they also must:

- possess a current WA driver's licence (i.e., 'C-Class', 'MR-Class', etc.)
- obtain management's authority prior to driving a PDT vehicle
- inform the PDT immediately if they have or are likely to have their driver's licence disqualified
- ensure that any PDT motor vehicle is not used by anyone other than authorised persons
- appropriately represent the PDT whilst in charge of the motor vehicle
- drive in a manner that is considerate of other road users and that would not bring the reputation of the PDT into disrepute
- obey all road rules
- always ensure that the driver and passengers wear seat belts
- ensure that they are not affected by alcohol and/or drugs at the time of driving
- ensure that the motor vehicle checklist is completed prior to use and
- report any defects and/or issues with the PDT motor vehicle as soon as reasonably practical.

### **USING A PRIVATE VEHICLE FOR WORK RELATED PURPOSES**

When an employee uses their own vehicle in the performance of duties, the employee is responsible for ensuring the vehicle is roadworthy and in a presentable condition.

Employees must ensure that they comply with *Road Traffic (Vehicles) Act 2014* by registering and insuring their vehicle.

Employees must also ensure that private vehicles are regularly serviced by a qualified mechanic.

Whilst driving a personal motor vehicle to perform work related duties, employees must ensure that the motor vehicle is clean and free of rubbish.

Employees must ensure that that PDT and/or personal items are stowed safely away and out of sight (i.e., in the glove box or in the boot) when the vehicle is not occupied.

### **PROVISION OF MOTOR VEHICLES BY THE PDT TO EMPLOYEES**

Vehicles provided by the PDT but used by employees for private purposes may be subject to Fringe Benefits Tax in respect of their private use. Accordingly, when an employee is provided with a PDT vehicle in the course of performing or carrying out their duties, the vehicle must be used solely for work purposes except for:

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- Vehicles provided under a salary sacrifice arrangement under which the employee bears the cost of the Fringe Benefit Tax; or
- Where otherwise approved in writing by the Diocesan Secretary.

Approval by the Diocesan Secretary for non-work-related travel is limited to the employee's private use of a panel van, utility (ute) or other commercial vehicle, which is not designed principally to carry passengers, and where their private use is limited to:

- Travel between home and work;
- Travel that is incidental to travel in the course of employment duties; or
- Non-work-related use that is minor, infrequent and irregular (such as occasional use of the vehicle to remove domestic rubbish).

The exemption also applies to non-work-related use by an employee's associate that is minor, infrequent and irregular. The employer or employee is not required to keep special records to be eligible for this exemption. However, the employee must be able to demonstrate the use of the vehicle meets the eligibility criteria at all times. In the event the PDT becomes liable to pay Fringe Benefit Tax as a result of the employees' failure to adhere to the above requirements, the PDT may recover the tax from the employee as a deduction from their pay.

### **USE OF MOBILE DEVICES IN VEHICLES**

Employees must comply with the following:

- mobile phones and/or any mobile device must not be used whilst operating a motor vehicle
- in the event that a phone call needs to be made and/or received, where safe and practicable, the driver is to safely pull the vehicle over to make or receive a call
- do not hold or touch a mobile phone and/or mobile device at any time whilst driving unless the motor vehicle is legally parked (even if the employee is just passing the device to a passenger)
- where a hands-free device is available, it may be safely used providing such use is compliant with WA road rules and that full care and attention to the road, other road users, weather conditions, etc is maintained at all times.

### **FIXTURES, FITTINGS AND MODIFICATIONS**

No fixtures such as aerials, roof racks, towing apparatus, or stickers may be attached to any PDT vehicle without prior written permission from your Manager.

No changes or alterations may be made to the manufacturer's mechanical or structural specification of PDT vehicles.

### **CLEANING AND MAINTENANCE**

When an employee operates a PDT vehicle, it is the responsibility of the employee to ensure that it is kept clean, tidy and free from rubbish and personal items at all times, and that the vehicle is returned to the PDT in that condition after use.

Smoking in PDT vehicles is not permitted.

The motor vehicle checklist must be completed prior to use and the employee must report any defects or issues with the PDT motor vehicle as soon as reasonably practical.



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### **FINES**

The PDT will not be held responsible and/or liable for any fines (e.g., parking, speeding, etc) incurred by an employee whilst working for the PDT. If the PDT receives an infringement notice for a PDT vehicle, the PDT will establish the driver and refer the driver's details to the relevant public authority (as per the infringement process). The relevant authority will issue the driver with an infringement notice of which the driver is responsible and liable to pay any resulting fine.

### **ACCIDENT PROCEDURE**

If an employee is involved in a motor vehicle accident (no matter how minor), the employee must comply with the Work Health and Safety Policy and notify management as soon as possible in accordance with the Incident and Hazard Reporting Procedure.

### **LOSS**

In case of theft of a PDT vehicle, the police and the PDT must be informed immediately. Full details of the contents of the vehicle must also be given. If a vehicle is stolen, the PDT is required to provide the insurance company with all relevant facts leading up to the theft of the vehicle.

Employees are to ensure that they pay due care and attention to the security of PDT vehicles.

If any contents are stolen from a PDT vehicle, the police and the PDT must be notified immediately.

Employees must always secure PDT vehicles and their contents, and when a PDT vehicle is not in use, the doors must be locked, the windows must be closed, and where fitted, the anti-theft alarm system must be activated.

When the employee is not in the PDT vehicle, the contents within the vehicle must be stowed out of sight, preferably in the glove box or the boot.

### **PERSONAL LIABILITY**

In the event of an at fault accident whilst driving a PDT vehicle or where any damage to a PDT vehicle is due to employee negligence or lack of care, the PDT reserve the right to discuss the matter with the employee. The outcome of the discussion between the PDT and the employee may result in the employee being required to reimburse the PDT for any expense incurred as a direct result of the employee's at fault accident and/or damage. Reimbursements may take the form of the employee covering the PDT's insurance excess payment and/or providing a financial contribution towards rectifying any damage that may not be covered via the PDT's insurance.

Each case will be treated on merit and may not necessarily result in the employee being required to reimburse the PDT, however, the decision as to whether reimbursement is required is at the sole discretion of the PDT.

Notwithstanding the above, repeated instances of at fault accidents and/or damage may result in disciplinary action up to and including termination and/or may result in the use of PDT vehicles being withdrawn.

### **GPS**

PDT vehicles may be fitted with a GPS tracking device which the PDT may use to monitor the location of the vehicle at any time for the purposes of security, monitoring driver behaviour and/or for ensuring the health, safety and wellbeing of employees is maintained as far as reasonably practicable.

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Where a PDT vehicle is fitted with a GPS tracking device, it will be clearly identified inside the vehicle.

Unless otherwise stated on the notification, GPS data will be collected on an ongoing basis. The PDT may disclose the GPS records for any reason that is not barred by privacy legislation.

Employees may consult with the employer regarding any concerns with GPS surveillance.



### **13. POLICY STATEMENTS REGARDING DRUGS, ALCOHOL AND SMOKING**

PDT is committed to providing a safe workplace. The use of drugs and/or alcohol may jeopardise the health, safety and wellbeing of others.

#### **EMPLOYER RESPONSIBILITIES**

The PDT is committed to providing a safe workplace and in doing so, the following principles apply:

- The PDT does not permit employees to be affected by alcohol and drugs in the workplace (*for the purpose of these policy statements ONLY, the workplace is defined as an employee's usual place of work and/or any grounds or property belonging to PDT and/or at any location where the PDT employee may be conducting work-related activities and/or non-work-related business activities for and on behalf of the PDT*).
- The PDT will take immediate remedial action in the event where it believes that an employee may be adversely affected by alcohol and/or drugs – this may be via an employee's self-admission or via the PDT suspecting that an employee may be 'unfit' for work, possibly due to the consumption of alcohol and/or drugs.

#### **EMPLOYEE RESPONSIBILITIES**

Employees must adhere to the following:

- Employees must not be affected by the consumption of alcohol or drugs that interferes with an employee's ability to carry out their job function and/or the job function of other employees
- Employees must not jeopardise their own safety and/or the safety of any other person resulting from the use of alcohol or drugs
- Employees are responsible for informing their Manager if they believe they may be adversely affected by alcohol and/or drugs – this may be prior to the commencement of work or whilst at work – and it is the employee's duty of care to disclose all matters of concern
- Employees are responsible for informing their Manager if they are taking prescription medication and/or non-prescribed medication and/or substances that may affect their ability to carry out their job function to the required standards.

#### **SMOKING IN THE WORKPLACE**

Smoking is not permitted on Diocesan property (i.e., grounds, buildings or vehicles), unless there is a designated smoking area.



## **14. POLICY STATEMENTS REGARDING TRAVEL EXPENSES**

From time to time employees are required to travel on behalf of the Diocese for business purposes. These policy statements set forth procedures and guidelines for incurring expenses and for their reimbursement.

### **EMPLOYER RESPONSIBILITY**

- Managers will adhere to the PDT's travel policy and procedures providing guidance to employees as required.
- The appropriate delegated authority (i.e., the Diocesan Secretary, Managers, Parish Priests, etc.) will determine if employee travel is required and is able to be funded within budget.
- The appropriate delegated authority is responsible for approving or declining expenses in accordance with Policy 23 – PDT Delegation and Authority Limits.

### **EMPLOYEE RESPONSIBILITY**

- Employees must provide detailed information to Managers as early as possible of each request for travel.
- Employees request for travel may only incur expenses that are consistent with the business needs and must exercise care attempting to minimise non-essential expenditure.

### **INTERSTATE AND OVERSEAS TRAVEL**

For interstate and/or overseas travel the Diocesan Secretary must be provided with a business case detailing the rationale for travel, a break-down of cost, and confirmation of insurance.

No flights, accommodation and/or event attendance is to be booked prior to receiving the Diocesan Secretary's formal written approval.

### **SPECIFIC TYPES OF EXPENSES**

**Air Travel:** Employees should generally select the least costly direct air route, considering advance purchase rates and airline discounts, for example Red E and Super Saver deals are preferred over Flexi Saver and Fully Flexible deals. Please bear in mind that changes to discount fares may incur additional costs, so you must be able to make a commitment to the travel dates and change them only under extraordinary circumstances.

**Hotels:** employees should use discretion and book rooms at reasonable priced hotels; mid-range hotels/apartments are preferred.

Accommodation costs may be reimbursed providing the employee has a clear rationale detailing the reasons why they are required to be away from home overnight. Examples of where this may occur could be:

- To attend a meeting that takes place over several days,
- To attend a meeting that commences at a time that would make it impractical for the employee to arrive on the day of the meeting,
- To attend a meeting that is expected to conclude at a time that would make it impractical for the employee to travel home on the day of the meeting,
- Where travel connections for the employee leaves no other viable alternative.

**Car Hire:** employees who are required to hire a vehicle whilst away on PDT business-related activities must opt to use the most cost-effective hire vehicle to therefore minimise unnecessary expenditure to the PDT. Upon the production of a valid receipt, the PDT will reimburse the employee for 'reasonable' use of the hire vehicle, but will not reimburse the employee for any excess travel associated with the hire vehicle and/or

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will not reimburse nor will be held liable for any accidents and incidents that may have occurred whilst the employee was in possession of the hire vehicle.

Employees will not be reimbursed for speciality hire vehicles (e.g., luxury, sports utility, convertible etc).

If personal vehicles are used, the PDT reimburses mileage incurred at a rate aligned to that determined by Diocesan Council for Clergy (unless otherwise determined by the PDT) and updated from time to time in Lay Employee Form 3A – Travel Expenses. Employees are not entitled to claim travel expenses to and from their home and normal place of work, but if travelling from home to a site other than the normal place of work; the distance claimed is to be the lesser of: (a) home to remote site, or (b) normal place of work to remote site.

An employee involved in an accident while driving a hire vehicle is required to notify the vehicle hire company **immediately** and the employee is **also** required to notify their Manager. Diocesan policy prohibits employees from operating a motor vehicle whilst under the influence of drugs and/or alcohol.

**Meals:** reasonable meal costs necessary for PDT related business will be reimbursed. Claims must be itemised and include receipts for any expenditure incurred by the employee.

### Travel Insurance

Where applicable, the Corporate Travel Insurance Policy covers employees travelling on authorised business interstate and overseas. Please note if travelling overseas the Diocesan Operations Manager must check with the insurance company that the destination(s) are fully covered by the existing insurance policy. If a variation to the existing insurance policy is required, the Diocesan Operations Manager must obtain a prior approval from the Diocesan Secretary confirming the expenditure to vary the insurance policy applicable to the destinations for travel.

Travel within the state is insured where the journey involves travel of more than 50km from the normal place of business excluding everyday travel to and from the normal place of business.

Incidental holiday travel is only insured where the primary purpose of the travel is to undertake PDT business. Where mixed travel is planned, appropriate documentation of this should be made as part of the approval to travel.

Electronic equipment is not insured when travelling by aircraft, bus or waterborne vessel unless it is carried by you as cabin baggage.

### Reimbursable Expenses

The following types of expenses, if incurred in compliance with this Diocesan policy and while on Diocesan business, may be submitted for reimbursement:

- Air travel
- Airport taxes
- Baggage handling
- Car rental
- Mileage pursuant to PDT business
- Internet (Wi-Fi) connection (for business purposes)
- Hotel accommodation
- Laundry and valet services (only applicable for trips over 5 working days)
- Meals
- Public transport (rail, bus, business use of taxi/shuttle)
- Business telephone calls
- Tolls and parking

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### **Non-Refundable Expenses**

- Airline lounge access
- Fines for traffic violations while on PDT business
- Loss of personal property while on PDT business
- Loss of cash advance, or personal funds
- Cost of personal credit cards
- Purchase of clothing and other personal items such as haircuts, personal hygiene products, magazines, alcohol etc.
- Purchase of in-room movies and entertainment

If you are uncertain about a particular expense, to avoid disappointment, please contact your Manager to obtain approval prior to incurring the expenditure.



## **15. ACKNOWLEDGMENT OF POLICY**

### **ACKNOWLEDGEMENT FORM AS CONDITION OF EMPLOYMENT AGREEMENT**

It is your responsibility to ensure that you abide by and remain familiar with policies, procedures, instructions and practices of the PDT. Please note that policies, rules, guidelines and legislation applicable to your employment and job function may be amended from time to time and that it is your responsibility to make yourself aware of these.

On commencement of employment, you will sign off an acknowledgement form. It is important to note that in signing-off your acknowledgement, you confirm that you have read, understood and agree to abide by PDT Policies and Procedures at all times. There may be disciplinary consequences if you fail to comply with PDT Policies and Procedures, which may result in the termination of your employment.

If you are unsure about the content of any PDT policy, before signing off, please contact HR to obtain clarification.

#### **FORMS:**

[Lay Employee Form 1 – Leave Form](#)

[Lay Employee Form 2 - Working from Home Self-Assessment Checklist](#)

[Lay Employee Form 3 - Payment Requisitions Form](#)

[Lay Employee Form 3A – Travel Expenses](#)

[Lay Employee Form 4A – ICT Network Use Agreement](#)

[Lay Employee Form 4B – Network Access Form](#)

[Lay Employee Form 5 - Policy Acknowledgment Form](#)

[Lay Employee Form 6 - Salary Sacrifice](#)

[Lay Employee Form 7 - Timesheets](#)