South West Yorkshire Partnership

NHS Foundation Trust

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With **all of us** in mind.

1   Introduction

South West Yorkshire Partnership Foundation Trust (the Trust) recognises the need to develop modern working practices to enable employees to maximise their performance and productivity whilst maintaining a good work life balance. In addition, new technologies are making it easier to access information remotely, and work from a variety of locations, supporting service delivery and improved patient choice.

There are many definitions of Agile Working, but the definition outlined by the Agile Organisation reflects the aims of the Trust in delivering the project and transitioning to business as usual (BAU):

> *Agile Working is about bringing people, processes, connectivity and technology, time and place together to find the most appropriate and effective way of working to carry out a particular task. It is working within guidelines (of the task) but without boundaries (of how you achieve it).[1]*

The where and when should not be the only considerations when adopting Agile Working, but how we do what we do, and whether it is being done in the most effective way. By providing staff with access to systems at the point of contact, the Trust is committed to empowering them to deliver an enhanced service which is safer, more efficient and more service user focussed.

The aim of Agile Working is for staff to take ownership of their working day and be empowered to make decisions (within their professional competences, and the boundaries agreed within their service) that improve efficiency, clinical record keeping, and deliver a patient centred approach to care, while providing an opportunity for staff to realise an improved work/life balance, through more flexible ways of working.

The Agile Agenda laid out by The Agile Organisation, will be used to underpin and measure decisions and practices related to Agile Working:

> *Views work as an Activity NOT a Place,*
> *Focuses on Performance not Presenteeism,*
> *Creates Trust Based Relationships not Hierarchies,*
> *Embraces Innovation rather than Bureaucracy, and*
> *Values People more than Property.[2]*

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[1] & [2] The Agile Organisation

The matrix below defines the key characteristics of the two workstyles adopted for the purpose of this project.

Agile Worker (s)	Fixed Worker (s)
• Spend most of their time working away from their desk • May travel across trust sites • Work on the move carrying out assessments in patient / service user homes • Attend meetings or spend time working at others trusts or partner sites • Work load is not location dependent • Have the option to work remotely including from home (ad-hoc) • Example Job Roles - CPN, District Nurse, Project Manager • Identified Desk Ratio 1:3	• Spend most of their time working at a fixed desk in an office (c. 90%) • Have specific individual equipment / furniture needs to enable them to perform their role effectively • Seldom away from their desk except for meeting with colleagues in office • Do not have an option to work from home • Example Job Roles - Personal Assistant, Secretary, Single Point Access (SPA) Worker • Identified Desk Ratio 1:1

These work styles are not designed to replace the concepts of working outlined within the Flexible Working Time Guidelines

To ensure the success of Agile Working the Trust's Information and Communications Technology (ICT) infrastructure must be developed to ensure continuity and ease of access for Agile Workers when working from various Trust locations and partner organisations. Currently WiFi access is available across all Trust sites, and within some partner organisations. The standardisation of the Trust Telephone platform across all Trust sites also underpins the Trusts Modernisation plan, Estates Rationalisation and Transformation programme.

Trust wide agile working will require not only a modern ICT infrastructure, but the engagement of all staff to create a new working culture across the footprint of the organisation. Through embracing new ways of working, and supporting a shift in the culture of working practices, staff can help successfully embed agile working principles across the Trust.

To ensure this policy remains accurate and focuses on the points most salient to agile working, the use of hyperlinks has been adopted throughout. This will mitigate the risk of providing conflicting information where other policies are changed. It also ensures the wider context of a policy is maintained, as the use of excerpts can cause confusion when taken in isolation from the rest of a policy. Hyperlinks appear as Blue and Underlined, and by clicking them you will be taken to the relevant policy or guidance.

2 Benefits

The adoption of agile working will see the Trust create efficiencies in clinical and non-clinical time which will provide a platform for delivering increased productivity to meet higher demands on services working with reduced or static budgets, while continuing to deliver quality outcomes.

Agile working will also provide the Trust with opportunities to provide value added services, to patients/service users, their families and carers as well as partner organisations, through quicker more proactive sharing of information and intelligence, via the ability to access clinical information at the point of contact and work from a diverse range of locations amongst members of the wider Multi-Disciplinary Team and its partners.

In addition, the development of new agile working practices will directly support other Trust initiatives such as the Estates Rationalisation and Transformation, as well as supporting the Trust's commitment to sustainability through a reduction in unnecessary mileage and production of paper documentation.

3 Purpose & Scope of Agile Working

The purpose of this policy is to define the key principles of agile working and ensure they are applied consistently across the footprint of the Trust.

This document should be used alongside the Agile Working Managers Guidance, Agile Working Agreement Form, and Employees Guide to Agile Working to support staff and managers in understanding agile working concepts, and ensure safe adoption of agile working throughout the Trust.

The policy also aims to sign-post staff to other relevant information, not unique to Agile Working, but that should be considered when making decisions about new ways of working.

This policy also aims to ensure best practice and 'lessons learned' are used continually to develop and maintain a single approach to applying agile working with new teams across the footprint of the Trust.

All Trust staff are eligible for agile working with the following exceptions:

- Inpatient & Forensic Inpatient Services
- Staff Identified as Fixed Workers (see workstyles matrix for further details)
- Staff with a condition or disability which limits their ability to undertake agile working (a full occupational health assessment and/or workstation assessment is required)

All staff within Trust teams including local authority staff are subject to this policy and all supporting policies when carrying out work on behalf of the Trust. All services moving towards agile working during the project phase will be required to undertake

Business Change Activities with the Agile Working Team in advance of the deployment of any IT Equipment.

4   Principles

Agile working is not prescriptive in its application i.e. one size does not fit all; but it is underpinned by key principles which should be evident in all decisions taken and all new ways of working. It should be used as a tool to maximise efficiency, improve service delivery, develop relationships and improve outcomes for patients, service users, their families and carers as well as staff.

Agile working aims to support the Trusts Mission and Values by:

1. Putting the patient/service user at the centre of all decision making/solutions. Service provision should always come first when considering agile working boundaries and agreeing expectations with staff.
2. Empowering clinicians by providing access to information at the point of contact to support them in delivering timelier, safer and more patient centred care.
3. Embracing a culture of innovation; encouraging staff to develop new working practices which focus on improving outcomes for patients/service users.
4. Focusing on delivering quality outcomes and improving performance; rather than on artificial measures of success such as whether someone is visible during 'work hours'
5. Developing both a responsive and proactive workforce, able to meet the needs of our service users whenever and wherever they come into contact with our services; by removing barriers such as connectivity, travel, time and reliance upon specific physical locations.
6. Emphasising the importance of staff wellbeing; particularly in creating an improved work/life balance by providing opportunities for staff to work in different ways.
7. Adopting the use of functional space across all Trust buildings, enabling staff to work in an environment which is conducive to the task they are completing. A 'clear desk' approach is to be implemented across all Trust sites, and no designated team space will be provided to agile working teams, ensuring sufficient hot desking facilities are available across localities.
8. Promoting equity across professional groups, teams and Business Delivery Units (BDU's). Agile working is not hierarchical, including in the provision of equipment; staff will receive a package which enables them to adopt new ways of working within the remit of their role.
9. Supporting teams through the change to an agile working model to ensure best practice and lessons learned are shared and embedded into core business. All services will work with the Agile Working Project team to develop their own vision for agile working which will form the basis of their new working practices.
10. Making the Trust a provider of choice for service users and carers by utilising technology to aid safer and speedier decisions and encourage collaboration on assessments and treatment plans.

5   Impact on Employment

The following policies/guidance should be consulted alongside this policy when considering any impact on employment:

- Flexible Working Time Guidelines
- Sickness Absence Policy Guidance for Managers
- Data Protection Act – employment records (managers guidance)
- Travel at Work Policy & Guidance
- Occupational Health & Wellbeing Policy
- Lone Working Policy

Managers should consult with a Human Resources Manager when a significant change is made to an employee's working arrangement.

6   Duties within the Organisation

The Executive Management Team (EMT) is responsible for approving this policy.

Responsibility for the development and implementation of this policy lies with the Deputy Director of Information Management & Technology, together with the Agile Working Mobilisation Group, led by the Agile Working Project Manager.

6.1   Service and Team Manager Responsibilities are:

- To be responsible for their own and staff member's adherence to this policy.

- To periodically review agile working arrangements for staff within their area of responsibility, in line with the policy and guidance.

- To ensure that all staff within their area of responsibility receive a copy of the policy along with the document entitled Agile Working: Employee's Guide

- To determine individual/team requirements and allocation of shared equipment. Where equipment is shared managers are responsible for its allocation and usage.

- To ensure the concepts of managing by outcomes (as referred to in the Agile Working: A Manager's Guide) have been successfully explained to all staff within their area of responsibility and appropriate methods to monitor output have been mutually agreed.

- To ensure flexibility, openness and constructiveness in all discussions and agreements about agile working with staff within their area of responsibility, whilst remaining focused on the needs of the service.

- To ensure all staff are aware of their responsibility to adhere to the Trust's agile working principles.

- To ensure all staff are aware of their responsibility to adhere to the Trust's existing policies and procedures that underpin Agile Working.

To ensure agile working is monitored through regular review such as appraisal, supervision and ad-hoc checks.

6.2   Individual Trust staff responsibilities are:

- To ensure they are familiar with the content of this document.

- To comply with all conditions contained within this document, and any other policies or guidance referenced within.

- To have joint responsibility with their manager in agreeing their level of agility and how they will carry out their role in a more agile way.

- To ensure flexibility, openness and constructiveness in all discussions and agreements about agile working with their manager, whilst remaining focused on the needs of the service.

- To ensure due care is taken regarding the security of any IT equipment their possession.

- To adhere to the Trust's agile working principles.

- To adhere to the Trust's existing policies and procedures that underpins agile working.

- To liaise with their manager for advice or clarification as required.

- To report to the Trust immediately once known, any loss, theft or to Trust IT equipment or the loss of confidential information.

To ensure all the necessary actions have been carried out as identified in the Agile Working: An Employee's Guide.

7   Associated Considerations for Agile Working

Agile working cross cuts many different specialist areas, including Information Management and Technology (IM&T), Health and Safety, Estates and Operational Policies and Procedures. Detailed below are the key elements of these area's pertaining to Agile Working.

7.1   Information Management & Technology

7.1.1 - Equipment

7.1.2 - Connectivity

7.1.3 - IT Skills

7.1.4 - Remote Working (including from home)

7.1.1 Equipment

All staff identified as agile workers will be provided with appropriate equipment to support them in fulfilling their role.

While an appropriate device, with the ability to view and record information into the clinical system (RiO or SystmOne) at the point of contact in collaboration with

patient/service user, will be provided through the Agile Working Project, any additional equipment such as Virtual Private Network Tokens (VPN), 3G/4G SIM cards and mobile phones are service funded.

The Agile Working Project Team will support services in identifying appropriate IT solutions prior to any agreement to fund and deploy the equipment. All equipment should be allocated based on the requirements of the job role and individual needs, not on pay band or seniority, and should allow staff to carry out their duties in the most effective and efficient way.

All IT equipment is the property of the Trust or its Partners. Staff allocated equipment to support them in their role are responsible for ensuring its security (and that of any data) while it is in their possession.

IT equipment should not be personalised or de-faced including the use of stickers etc. IT equipment is the property of the Trust and upon its return may be used by another staff member.

IM&T will continue to work toward timely deployment of agile working equipment to avoid business continuity issues and mitigate potential inequalities relating to agile working practices. Additional solutions will also be sought to continue to develop agile working practice through the innovative use of new technology.

In the event of technology being used for agile working purposes being out of operation or unavailable for any reason, staff should log an incident with the Trust IM&T service desk and follow local Business Continuity arrangements. This may include the booking of a loan laptop from their nearest BDU Health & Wellbeing Centre upon presentation of the incident reference number provided by the IM&T service desk.

In the event that a device provided through the agile working project is stolen, and the staff member can evidence having taken appropriate safeguards to minimise this risk, such as ensuring it is stored out of site, in the most appropriate secured environment, the theft should be reported to police and a crime reference number obtained before logging a Datix Incident. Following investigation if it is evident that appropriate safeguards have been undertaken a replacement will be provided during the time in which the project is still ongoing i.e. prior to formal project closure. After this time the staff member or service will be liable for funding a replacement device.

Any repairs or replacement of equipment as a result of breakages is to be funded from the service.

7.1.2 Connectivity

The Trust's Wide Area Network (WAN) is available across all Trust sites through either a wired connection or WiFi. This will allow staff to go to any Trust building and log on to the SWYT domain to obtain access to files and programmes as if they were at their nominal base.

Where a wired connection is available either through a docking station or via an Ethernet cable plugged straight into a live network point, this should be used in

preference to WiFi, as it is quicker, and interruptions caused by overuse of the wireless network to network connectivity are minimised.

7.1.3   IT Skills

At the outset of any work conducted to move services towards agile working, all staff will be provided with the opportunity to complete a self-assessment of their basic IT Skills. This will be reviewed by the agile working team and where required additional support and training will be provided.

Training on all new IT solutions deployed to facilitate agile working will be done at the time of deployment of equipment with ad-hoc follow up support also available.

7.1.4   Remote Working (including from home)

Remote working is defined as:

> *Employees operating away from an employer's place of business. This could be on the road or in the field, at home or abroad.*

> *[http://www.safeguardict.com/remote-working/]*

This definition encompasses the ability of staff to utilise their home environment to carry out admin related tasks using Trust IT equipment.

Remote working from home should only be undertaken under prior agreement with manager. This may be on a case by case basis or on a more formal understanding based around fulfilment of clinical work.

The ability to undertake remote working from home should not be used as a substitute for childcare arrangements. Any remote working from home should be on the basis that staff are contactable as they would be when working from a Trust location or undertaking community visits, and it is documented in their electronic diary if done during service hours.

In the event that staff are required to respond to an urgent request for a visit, meeting or other service need they should be able to return to their caseload area in a timely fashion. Timeliness of response will differ by service so ground rules should be agreed within the service and documented within the Agile Working Agreement form.

7.2   Health & Safety

7.2.1 - DSE / Workstation Assessment

7.2.2 - Lone Working

7.2.3 - Infection Control

7.2.4 - Moving and Handling

7.2.5 - Pregnant Workers

7.2.6 - Driving at Work

7.2.1   Display Screen Equipment (DSE)

A laptop, notebook or tablet device is defined as portable DSE. It is acknowledged that it is not practical to analyse each location the equipment is likely to be used. Staff should take measures to control risks whenever they set up portable equipment. For more information on how to do this see 'Recommendations when using portable DSE and Agile Working' contained within the section 5.3 of the Trusts DSE policy.

When working from a workspace for a continuous period of time (defined in DSE policy as more than one hour) a workstation self-assessment is recommended. The Workstation Assessment document can be found within the risk assessment pages of the Trusts Health & Safety Intranet pages.

Staff should ensure they have completed a work station assessment on their home environment prior to use. Whenever there is a change to the home environment it should be re-assessed and reported to their manager.

It is each staff member's responsibility to make a judgement on whether the workstation they are using is conducive to ensuring their ongoing health needs are met. If any issue is identified this should be reported to their line manager.

For Further information please refer to the Trust's Policy on Display Screen Equipment (working with)

7.2.2   Lone Working

All services are required to risk assess each job role, to identify if their current lone worker protocol is fit for purpose to ensure the safety of staff within an agile team. In the event that it is not, the service should ensure they develop a clear, robust protocol to ensure staff are aware of their own responsibilities and any escalation procedures in place in the event of an incident.

There are key precautionary measures that should be considered and provision put in place to ensure that they are documented and monitored. Examples of these are:

- All electronic diaries are up to date and are as accurate as possible, enabling a staff member's most recent location to be checked in the event of an incident.
- A robust 'buddy' system or similar is in place to allow staff to call in once they are safe.
- The use of a Lone Worker device where the job role has been risk assessed and a device has been deemed necessary.

For further information on Lone Working and developing a service specific protocol please refer to the Lone Worker Policy and Guidance.

7.2.3   Infection Control

All keyboards and mice should be wiped clean after use with an appropriate disposable wipe, in line with recommendations from the Trusts Infection Prevention

and Control team. Wipes should be provided by the BDU or service where the hot desk facility is located.

All hot desks should be left as staff would wish to find them, ensuring that the desks are left clear enabling the next person to start working.

7.2.4 Moving and Handling

The Manual Handling Operations Regulations 1992 (as amended) (MHOR) define manual handling as:

> *'…any transporting or supporting of a load (including the lifting, putting down, pushing, pulling, carrying or moving thereof) by hand or bodily force...'*

All staff should be aware of the risks involved when carrying or moving loads as part of their daily activities and if these risks cannot be avoided then a suitable and sufficient risk assessment must be carried out.

If a risk is identified then steps should be taken to reduce the risk to the lowest level reasonably practicable. These loads could include laptops, bags or teaching resources. The Load Handling risk assessment form can be found on the Health and Safety pages of the Intranet and further advice can be sought from the Moving and Handling Advisers or Health and Safety Manager.

Please also refer to the Moving and Handling Policy for further information.

7.2.5 Pregnant Workers

New and expectant mothers may be impacted by the adoption of agile working within the Trust. The ability to have greater control over the management of their workload both in terms of appointment/meeting management, and the ability to work remotely could positively support staff during pregnancy and during their return to work following maternity leave.

Conversely, it should be acknowledged that staff may see an increase moving and handling risk associated with carrying both IT and clinical equipment and therefore some elements of agile working may be sacrificed during this period. Changes should be agreed with their service manager.

The law requires employers to assess workplace risks for all employees and take practical action to control those risks (Management of Health & Safety at Work Regulations 1999). In addition employers must take particular account of risks to new & expectant mothers. These risks may come from display screen equipment use, driving at work, moving and handling and other health and safety issues outlined in the New and Expectant Mothers risk assessment which can be found on the Health and Safety pages of the Intranet. Further support and advice can be sought from the Occupational Health and Wellbeing team, Moving and Handling Advisers or Health and Safety Manager.

Further information can also be found in the Pregnant Workers/New Mothers Risk Assessment and Action Plan

7.2.6 Driving at Work

Staff who undertake travel to, from and during work should always ensure any Trust equipment is stored securely (locked, and out of sight) in the boot of the car prior to departing on their journey to minimise the risk of the equipment being stolen.

Staff should never undertake computer work or use a mobile telephone while driving without the use of a hands free facility. If a staff member doesn't have this facility and needs to make or receive a call they should do so after pulling over in safe manner and only if the environment is safe to do so.

Staff may undertake short periods of computer work from within the car provided it is stationary and the engine is not engaged. This is done at the discretion of the staff member and should be limited to short periods, having assessed the risk of doing so, and in line with guidance on the use of portable DSE.

For further guidance please refer to the Travel at Work Policy and Guidance

7.3 Information Security, Confidentiality and Information Governance (Including Care Records)

7.3.1 - Safe Haven

7.3.2 - Paper Records

7.3.3 - Electronic Media

7.3.1 Safe Haven

In line with the Trusts Safe Haven policy, all staff, when in possession of personal, sensitive or confidential information, are themselves considered a 'Personal Safe Haven', and should adopt working practices to maintain security of all information.

This accounts for all forms of information including, but not limited to, electronic, paper and information communicated verbally, both in person and over the phone.

It is the responsibility of all staff to ensure the patient's confidentially is maintained at all times. In order to do so staff must maintain an awareness of their surroundings and the threats to information security in their immediate vicinity.

As such there are no physical or geographic boundaries to Safe Haven.

Further information can be found within the Trusts Safe Haven policy.

7.3.2 Paper Records

Paper records containing sensitive information such as personal identifiable data (PID) or business sensitive information should be stored and carried in line with the Trusts Safe Haven Policy and Guidance. As such anyone transporting sensitive information should ensure it is discreetly packaged and staff must remain aware of any threats to information security in their immediate vicinity.

Consideration should always be given to circumstances where it is appropriate to transport and store information, and where possible this should be minimised. In instances where paper records/documentation is taken home, staff should ensure it is only done so if there is no other option, and safe haven guidance can be applied.

7.3.3 Electronic Media

All staff are responsible for any data stored on electronic equipment allocated to them when in their possession. This includes but is not limited to, laptops, mobile phones and encrypted memory sticks.

All mobile devices provided by IM&T are encrypted prior to distribution to staff. Staff should never use a device to store sensitive information that is not encrypted. Please contact the service desk if unsure if a device is encrypted. The exception to this is 'basic' mobile phones. As a result no information including photo's should be stored on a mobile phone if of a sensitive nature.

Staff should take due care to discreetly transport and store any equipment. Prior to commencing a journey staff should ensure all electronic equipment is placed out of site and locked in the boot of the car. Electronic equipment should never be stored in a car overnight.

Further information is available in the Trust's [Information sharing, confidentiality and data protection policy](#) and [Acceptable use of communications technology policy.](#)

7.4   Human Resources

7.4.1 - Nominal Base

7.4.2 - Flexible Working

7.4.1 Nominal Base

All staff will continue to have nominal base for travel claims purposes. A nominal base can be defined as a Trust or Partner building which is central to the catchment area in which their caseload is located. This ensures the nominal base is meaningful to the service and its service users. The location of the team/service manager and/or colleagues is irrelevant for the purpose of allocating the nominal base.

While a nominal base will be used for the purpose of travel claims staff should be encouraged to work from alternative locations which aid improved efficiency, reduce mileage and travel time and enable them to deliver a more effective service.

The nominal base will be used to calculate mileage expenses. Standard Agenda for Change rules on mileage applies.

An Allocation of Team Base form can be used to notify payroll of a change to a staff member's nominal base. Any decision to change a staff member's nominal base rests with the manager.

For further information on identifying and notifying payroll of a change of base please refer to the document entitled [Guidance for Managers Allocation of Base](#)

7.4.2   Flexible Working

Agile working is not a substitute for 'Flexible Working'. However if agreed in advance with a manager a staff member may be able to undertake remote working provided their role can still be safely and effectively fulfilled. The adoption of agile working may also provide an opportunity for workload to be managed in a different way. Provided service provision is unaffected, contracted hours are fulfilled and agreed outputs are satisfactory this may provide an opportunity for some degree of flexibility on an ad-hoc basis.

For full details on flexible working patterns please refer to the Trusts Flexible Working Time Guidelines

7.5   Estates & Facilities

    7.5.1 - Hot Desking

    7.5.2 - Room Booking

    7.5.3 - Portable Appliance Testing (PAT)

7.5.1   Hot Desking

A hot desk is defined as a "Workspace for any employee to use at any time."

In order to support staff to work in an agile manner the Trust will adopt the use of functional space. Functional space can be defined as space that is not service or team specific and can be used by any Trust employee requiring a workspace in that area. Where possible, multi-purpose and quiet areas will be provided to support staff in carrying out work activities as appropriate.

Every desk is a hot desk and as such should not contain any personal belongings such as photographs, plants, mugs etc. All desks should be clear with the exception of any IT equipment located on the desk to support staff in carrying out computer work. This includes desks allocated to 'fixed' workers, as they should be clear and available to use by other staff during periods of absence such as annual leave, sickness or non-working hours.

A range of work environments and work stations will be provided within the new Hub developments e.g. quiet areas, ad-hoc 1-1 space, telephone booths/areas. Staff must respect colleagues working in these areas e.g. by not making phone calls in quiet areas. Where refurbishment/reconfiguration work is undertaken on the Trusts existing estate these principles will also be adopted.

Identified desk ratio's, developed in consultation with BT and adapted following the agile working pilot in Kirklees, should be applied fairly across all localities and staff groups. These are 1:3 for agile workers and 1:1 for fixed workers.

7.5.2 Room Booking

Consulting, clinic and meeting rooms will be made available via an electronic booking system with priority given to clinical appointments with patients/service users.

The management of room bookings may differ by locality but anyone wishing to book a room must provide their name and contact details in case of cancellation. Room usage may be monitored and anyone booking rooms which are not subsequently used may be subject to the privilege being withdrawn.

For further information please refer to the Trusts Room Booking Policy.

7.5.3 Portable Appliance Testing (PAT)

All electronic equipment must be regularly PA Tested to ensure it is safe for use. The Trust operates an annual PAT programme. It is the responsibility of the staff member to ensure they present at a Trust site when the programme is underway to ensure all equipment is checked and confirmed safe to use. IT Equipment should be PA tested on a 2 yearly cycle.

Details of the PA Testing programme are communicated via the Trusts intranet and weekly comms. Staff should ensure they remain up to date with Trust-wide communications of this nature via these mediums.

7.6 Operational Policy

7.6.1 - Communication

7.6.2 - Availability

7.6.3 - Performance Management

7.6.4 - Supervision Arrangements

7.6.5 - Student Placements

7.6.1 Communication

In an agile working environment communication becomes even more vital to ensure the Trust is able to provide safe and effective services for both service users and staff.

It is important to acknowledge the role of both formal and informal communications, the limitations, and adopt new communication strategies including the use of technology when undertaking agile working.

As staff become more detached technology plays a vital role in ensuring communication channels remain open. The use of Skype for Business will be

adopted to allow staff and services spread disparately across multiple locations to keep in touch. Agile workers should be provided with a suitable mobile telecommunications solution. This may differ by role and should be agreed at service level with advice from the Agile Working and Telecoms teams.

Agile working provides opportunities to consider more efficient and effective means of communication. For example, the use of Skype for Business could be adopted to replace traditional face to face meetings, reducing travel to base and creating more 'time to care'. However it is essential that time is built in to enable face to face meetings and communication to an appropriate level as agreed at BDU and/or service level.

7.6.2 Availability

Agile working must not adversely impact the provision of services; therefore managers must ensure that they have systems in place to maintain a suitable office presence as required, and to monitor the level of available front line staff on duty at any one time.

Service provision and responsiveness should also inform agile working boundaries and any agreements related to remote working from home. As such it is essential to plan and agree a work programme for others so that they are aware of an individual's working patterns, current location and contact arrangements. Hours of work must be agreed in advance allowing employees the right to privacy out of hours enabling them to separate work and home time.

7.6.3 Performance Management

Performance management is key to the successful implementation of agile working and supports the Trust in ensuring staff wellbeing, safety and health are maintained, while continuing to deliver efficient and effective services. In an agile working environment, staff are often less visible to managers and colleagues. This can create anxiety. Staff must be clear on how they will be managed and what is expected of them in terms of output. This should be agreed between staff member and manager.

Monitoring a person's output must go beyond looking at the level of activity, and also look at data quality, timeliness of record keeping, caseload management and other non-patient/service user related workload such as training.

These outputs reflect a more accurate picture than someone being present on site at prescribed times of day.

7.6.4 Supervision Arrangements

Managers and staff should explore opportunities for both formal and informal supervision and agree any changes to the current format prior to commencing agile working. Supervision should be a forum for discussing performance against pre-agreed performance management outcomes and discuss any concerns related to Agile Working practices as well as an opportunity to discuss additional support and training opportunities.

The ongoing wellbeing of staff should be monitored through regular review of agile working arrangements by managers as detailed further in the document 'Agile Working: A Managers Guide.'

Managers should allow opportunity to meet virtually via Skype for Business where requested but also ensure staff have access to support and supervision in a face to face setting.

For further information on supervision requirements please refer to the Supervision of the Clinical Workforce Policy

7.6.5   Student Placements

Supporting high quality education for students is a core element of the Trust's business and the organisation supports staff to develop and demonstrate a positive culture in which students can learn.

Agile working allows additional flexibility to be built into a standard working day/week, however consideration should be given to staff (student mentor) that are expected to provide the student with direct supervision. For example, it may be that the staff member undertakes some element of remote working from their home. It is inappropriate and outside of Trust policy to allow the student to work alongside colleagues in their homes. Being shadowed by a student should not pose significant problems for teams when it comes to agile working, providing suitable working arrangements are in place to manage such situations.

Where there is a requirement to undertake remote working from home, suitable alternative arrangements need to be made for the student. This could involve co-mentoring or short placement with a colleague.

It may in some circumstances be more suitable for team members to sacrifice this element of agile working completely while undertaking the role of mentor.

During placement students will often be required to undertake computer based work. The introduction of agile working is seeing the rise in use of laptops and a subsequent reduction in desktop computer facilities. To account for this, the Practice Placement Quality Team can provide a number of bookable laptops for use by students during their placement.

The agile working project will also provide an initial 'pool' of laptops to be available for booking from the various locality Health & Wellbeing Centre's located around the Trust. The management of this booking process will be undertaken by the BDU with supporting booking guidance to be developed. These laptops will also be available for use by bank/agency staff or in the event of a clinician's laptop being out of use. If this occurs, a job number should be obtained from the IM&T service desk before the loan of this equipment is permitted to minimise the time the laptops are unavailable for use by students and bank/locum workers.

For further advice and guidance please refer to the Practice Placement Quality Team intranet pages

8   Dissemination and Implementation

This policy once approved will be highlighted to staff via the weekly Comms update e-mail and will be placed on the Trust document store and Agile Working intranet pages. Given the geographical spread of the Trust the only way to ensure staff access the current version is that it is only available on the intranet/website. Business Delivery Units (BDUs) will be responsible for more detailed briefings to appropriate staff with support from the Agile Working Team.

A 'Frequently Asked Questions' page will be developed and will be available on the Intranet. This will be a 'live' document so will be updated on a regular basis.

The implementation of the Agile Working Policy will be supported by all managers of staff, together with advisors within Quality Academy Services such as Information Management & Technology, Human Resources, Performance & Information, Health & Safety, Estates and Facilities etc. During the Trust wide implementation of agile working, the Project Team and designated Project Manager will also work with staff to ensure the successful implementation of this Policy.

9   Process for Monitoring Compliance and Effectiveness

A formal benefits realisation process will be developed in order to monitor the effectiveness of Agile Working within the Trust. This will also monitor the uptake of the new working arrangements and assess their effectiveness.

In order for a robust set of Key Performance Indictors (KPI's) to be established, ongoing monitoring of the 'Early Adopter' teams will be conducted. The data gathered and analysed during this exercise will provide invaluable information to assist with the production of a final dashboard of KPIs. Following formal closure of the agile working project this dashboard will be monitored by Service/Team Managers using data provided by Quality Academy services such as Performance and Information, Human Resources and Payroll.

Any accident or injury, and all security incidents must be reported in the normal way and will be monitored and reported to the Health and Safety Trust Action Group via the Datix system or to the Information Governance Trust Action Group, as necessary.

10   Review and Revision Arrangements (including archiving)

This policy will be reviewed on a regular basis by the Agile Working Project Team in conjunction with colleagues from Quality Academy services as appropriate throughout the project lifecycle. Once formal project closure has taken place, the policy will be reviewed in line with HR processes.

In the event that this policy is not reviewed in line with the scheduled review date, this version will still stand as the most recent guidance until such point that an updated version is produced to supersede it.

Where substantial changes are required relating to agile working the policy will be reviewed earlier than the date specified and sent for approval.

This policy will be retained in accordance with requirements for retention of non-clinical records.

Historic policies and procedures:

- A central electronic read only version will be kept in a designated shared folder to which all Executive Management Team members and their administrative staff have access.
- A version control sheet is included within Appendix A

Equality Impact Assessment template to be completed for all policies, procedures and strategies

Date of assessment: 15 August 2016

	Equality Impact Assessment Questions:	Evidence based answers & actions:
1	**Name of the document that you are Equality Impact Assessing**	Agile Working Policy
2	**Describe the overall aim of your document and context?** **Who will benefit from this policy/procedure/strategy?**	The overall aim of the policy is to outline the Trust's intention and approach to implementing and maintaining an Agile Working environment The Trust and its partners, Staff, Service Users and Carers
3	**Who is the overall lead for this assessment?**	Deputy Director of Information Management and Technology (IM&T)
4	**Who else was involved in conducting this assessment?**	Agile Working Project Manager, Agile Working Mobilisation Group
5	**Have you involved and consulted service users, carers, and staff in developing this policy/procedure/strategy?** **What did you find out and how have you used this information?**	Through workshops delivered to provide an insight into the new Hub buildings and related working practices service users and carers were invited to attend to gain an insight. Although attendance was poor both groups were represented, and were encouraged to contribute towards, amongst other things, Agile Working ideas that would be used to inform Agile Working practice and this policy. Staff from the initial Kirklees Pilot were consulted between September 2014 and March 2015 about their experiences which informed this policy, along with the outputs from the Calderdale Hub workshops. All groups consulted consisted of mixed gender profile as well as a diverse age range with some ethnic variation. Draft versions of the policy have also been shared with staff who have responded favourably. The overall outcome of these consultations was that Agile Working was seen as an enabler to more efficient service user focused service delivery. Some feedback did feel there was a need for investment in the infrastructure and estate to underpin Agile Working.
6	**What equality data have you used to inform this equality impact assessment?**	Minimal equality data relating to Agile Working is available, as it is relatively early within the sector. It is anticipated that data could be taken once a larger sample of Agile Workers is available
7	**What does this data say?**	N/A

8	Taking into account the information gathered above, could this policy /procedure/strategy affect any of the following equality group unfavourably:	Yes/No	Evidence based answers & actions. Where negative impact has been identified please explain what action you will take to remove or mitigate this impact.
8.1	Race	No	Not relevant to Agile Working
8.2	Disability	Yes	Agile Working can have a positive impact group, promoting alternatives to the standard way of working. Conversely, staff with a disability may feel that some of the elements of Agile Working cannot be fully adopted, which may lead to them feeling excluded from a number of opportunities available to their colleagues.
8.3	Gender	No	Not relevant to Agile Working
8.4	Age	Yes	Indirectly linked to age, anecdotal evidence that older people find this challenging partially due to less familiarity with routine use of mobile technology and having a lower ability of keyboards and using technology. The control measure is the IT skills audit, raising this in appraisals and delivering training through the Agile Working Team and the IT Project Support Officer.
8.5	Sexual orientation	No	Not relevant to Agile Working
8.6	Religion or belief	No	Not relevant to Agile Working
8.7	Transgender	No	Not relevant to Agile Working
8.8	Maternity & Pregnancy	Yes	Agile Working can have a positive impact on this group, allowing a more flexible approach to their workload where service delivery allows. Conversely the potential to be transporting equipment between locations could have an adverse impact, as it increases moving and handling risks
8.9	Marriage & civil partnerships	No	Not relevant to Agile Working
8.10	Carers (Our Trust requirement)	No	Agile Working can have a positive impact on this group, allowing a more flexible approach to their workload giving scope for staff to work around carer responsibilities where service need allows.
9	What monitoring arrangements are you implementing or already have in place to ensure that this policy/procedure/strategy:-		
9a	Promotes equality of opportunity for people who share the above protected characteristics;		

9b	**Eliminates discrimination, harassment and bullying for people who share the above protected characteristics;**	
9c	**Promotes good relations between different equality groups;**	
9d	**Public Sector Equality Duty – "Due Regard"**	
10	**Have you developed an Action Plan arising from this assessment?**	
11	**Assessment/Action Plan approved by** **(Director Lead)**	**Sign:** **Date:** **Title:**
12	***Once approved, you <u>must</u> forward a copy of this Assessment/Action Plan to the partnerships team:*** **partnerships@swyt.nhs.uk** **Please note that the EIA is a public document and will be published on the web.** **Failing to complete an EIA could expose the Trust to future legal challenge.**	

Version	Date	Author	Status	Comment / changes
0.1	January 2011	Agile Working Project Manager	Draft	For Comments from HR
0.2	February 2011	Agile Working Project Manager	Draft	For Comments from Equality and Diversity
0.3	March 2011	Agile Working Project Manager	Draft	For comments from Staff Side
0.4	March 2011	Agile Working Project Manager	Draft	For Comments from the Information Governance TAG
0.5	March 2011	Agile Working Project Manager	Draft	For comments from the Moving and Handling Adviser
0.6	April 2011	Agile Working Project Manager	Final Draft	Final amendments. To EMT for approval
1.6		Agile Working Project Manager	Final	EMT approval received
2.0	February 2015	Agile Working Project Manager	Draft	Re-write to reflect developments in project and principles since 2011
2.1	February 2015	Agile Working Project Manager	Draft	For comments from Health & Safety
2.2	March 2015	Agile Working Project Manager	Draft	For comments from Estates Capital Planning Manager for Calderdale Hub
2.3	March 2015	Agile Working Project Manager	Draft	For comments from IG/DQ Sub Group
2.4	March 2015	Agile Working Project Manager	Final Draft	Sent to EMT for approval
2.5	March 2015	Agile Working Project Manager	Final	Additions made to cover the use of hyperlinks to other policies, as well as additional sections for Estates / Accommodation Requirements / Infrastructure and confidentiality
2.6	August 2016	Agile Working Project Manager	Draft	Reviewed by Agile Working Mobilisation Group and Practice

				Governance Coaches

Abbreviation	Definition
BAU	Business as usual
BDU	Business Delivery Unit
DSE	Display Screen Equipment
EMT	Executive Management Team
ICT	Information and Communications Technology

DEFINITIONS

IM&T	Information Management and Technology
KPI's	Key Performance Indicators
MHOR	Manual Handling Operations Regulations
PAT	Portable Appliance Testing
VPN	Virtual Private Network
WAN	Wide Area Network