

<b>SUBJECT:</b>	<b>APPROVAL OF REQUEST FOR FLEXIBLE EARLY RETIREMENT WITH REDUCED WORKING HOURS TO 3 DAYS PER WEEK</b>
<b>MEETING:</b>	<b>INDIVIDUAL CABINET MEMBER DECISION</b>
<b>DATE:</b>	<b>12<sup>th</sup> APRIL 2017</b>

**NON-PUBLICATION:** Appendix 2 to this report contains additional information regarding the individual officer's personal circumstances and therefore Appendix 2 should not be published.

**1. PURPOSE:**

1.1 To request approval to allow a colleague from the Development Services team to take flexible early retirement, with the associated cost to the Council of £9772.74 per year for the next three years being met within the department's existing budget.

**2. RECOMMENDATIONS:**

2.1 That Cabinet Member approves the request for flexible early retirement with the associated reduced working hours (3 days per week).

**3. KEY ISSUES:**

3.1 Staff wellbeing:

3.1.1 The colleague in question has requested flexible early retirement to provide a better work-life balance, taking into account family and health needs. Approving reduced working hours and flexible early retirement resolves this concern. Should the request be declined, it is considered that the colleague's ability or desire to continue working full time and at full capacity until the age of 60 will diminish with time, to the detriment of their wellbeing and the Council's ability to deliver its services. A decision to fully resign would mean the Council loses considerable experience and knowledge without an opportunity for succession planning, which is highly undesirable.

3.1.2 A proposed restructure has been submitted for Cabinet Member approval which provides additional management resource and allows for succession planning and staff development over the next 2-3 years. Subject to approval of that proposal, the request for flexible early retirement can be agreed without any adverse impact on the well-being or capacity of the wider team.

3.2 Service delivery:

3.2.1 As stated above, a proposed restructure has been submitted for Cabinet Member approval on 29<sup>th</sup> March 2017 to address this issue. Subject to that proposal being approved, this request can be accepted without any detrimental impact on service delivery or customer care, and measures for succession planning and career progression can be delivered.

3.3 Financial:

3.3.1 The colleague in question is under 60 years of age and therefore approving the request for flexible early retirement will result in a cost to the Council of £9,772.74 per annum for the next three years. This cost would be met by the current service budget by reducing expenditure on professional fees (D080). This cost is taken into account as part of the budget assessment for the proposed restructure and also factors in the agreed 2017/18 budget savings offered by the Planning Service. As a result of all of these proposals combined, the professional fees budget line would reduce by £24,800 to £92,223.

#### **4. REASONS**

4.1 It is acknowledged that the approval of flexible early retirement for colleagues below the age of 60 is relatively rare, due to the financial pressure on the Council. However, in this instance the request is supported for the following reasons:

- It allows for succession planning before the post-holder fully retires/leaves, which is likely to be much sooner if this request is declined. The proposal is therefore better for the colleague in question and for the service/Council, allowing for the post-holder's considerable knowledge and experience to be imparted and for other team members to have an opportunity for progression with support from the colleague in question. This in turn will support staff retention and give the opportunity to develop identified management and leadership qualities in existing members of staff;
- The financial cost is relatively low and can be met by the existing budget.

#### **5. RESOURCE IMPLICATIONS:**

5.1 The request for flexible early retirement will result in a cost to the Council of £9,772.74 per annum for the next three years. This cost would be met by the current service budget by reducing expenditure on professional fees (D080). This cost is taken into account as part of the budget assessment for the proposed restructure and also factors in the agreed 2017/18 budget savings offered by the Planning Service. As a result of all of these proposals combined, the professional fees budget line would reduce by £24,800 to £92,223.

#### **6. CONSULTEES**

Senior Leadership Team

Development Services colleagues via Management Team meetings and whole Team meetings with regards to the proposed restructure referred to in the report, which included discussion around the potential flexible early retirement and reduced working hours.

Chair, Deputy Chair and Lead Opposition Party Member from Planning Committee

Finance Officer (Davina Hicks)

People Services (Sue Caswell)

#### **7. BACKGROUND PAPERS**

**Appendix One** – Future Generations Evaluation (summarised below)

**Appendix Two** – Additional (personal) information - confidential

#### **8. FUTURE GENERATIONS IMPLICATIONS**

The completed Future Generations Evaluation can be found in Appendix One below. In summary, the proposed flexible early retirement would support a colleague's need for an appropriate work-life balance and at the same time allow for succession planning and staff development. The impact should be positive with no negative impacts identified.

9. **AUTHOR:** Mark Hand – Head of Planning, Housing & Place-shaping

#### **10. CONTACT DETAILS:**

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## Appendix 1



# Future Generations Evaluation (includes Equalities and Sustainability Impact)

<p><b>APPENDIX ONE</b></p> <p>Name of the Officer Mark Hand          Phone no:07773 478579          E-mail: <a href="mailto:markhand@monmouthshire.gov.uk">markhand@monmouthshire.gov.uk</a></p>	<p><b>APPROVAL OF REQUEST FOR FLEXIBLE EARLY RETIREMENT (BEFORE AGE 60)</b></p>
<p>Name of Service: Planning (Enterprise and Innovation Directorate)</p>	<p>Date: Future Generations Evaluation 11 March 2017</p>






*NB. Key strategies and documents that may help you identify your contribution to the wellbeing goals and sustainable development principles include: Single Integrated Plan, Continuance Agreement, Improvement Plan, Local Development Plan, People Strategy, Asset Management Plan, Green Infrastructure SPG, Welsh Language Standards, etc.*

### 1. Does your proposal deliver any of the well-being goals below?

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A prosperous Wales</b>            Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>The proposal seeks to strike a balance between an individual's health and family needs with succession planning and passing their considerable knowledge and experience onto colleagues via proposed succession planning. The proposal seeks to make the best use possible of skills and resources in terms of succession planning, provides a job opportunity.</p>	<p>Careful budget management to allow for the costs incurred.</p>
<p><b>A resilient Wales</b></p>	<p>Ensuring the planning service is properly resourced is essential to an effective service, part of which includes</p>	

<b>Well Being Goal</b>	<b>Does the proposal contribute to this goal? Describe the positive and negative impacts.</b>	<b>What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?</b>
Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	ensuring our green spaces and cultural heritage is supported.	
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	Positive impact by ensuring quality services are provided. Approval of the request supports the colleague in question's well-being and health. Promotion opportunities and appropriate levels of management support as part of the restructure proposals will have positive impact on the well-being of colleagues.	
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	Neutral impact by ensuring quality services are provided	
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	Neutral impact by ensuring quality services are provided	
<b>A Wales of vibrant culture and thriving Welsh language</b> Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	Neutral impact by ensuring quality services are provided, which includes heritage management.	
<b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances	Positive impact by ensuring quality services can continue to be provided and by giving promotion opportunities to colleagues. Increased capacity to deliver service improvements.	

**2. How has your proposal embedded and prioritised the sustainable governance principles in its development?**

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Long Term</p> <p>Balancing short term need with long term and planning for the future</p>	<p>The proposal seeks to balance budget pressures with the immediate needs and wellbeing of a colleague.</p>	<p>The associated restructure allows for succession planning and longer term staff development and service resilience.</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>Not applicable.</p>	
 <p>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>As above</p>	
 <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The rationale for the proposal is to allow for a gradual and managed retirement with succession planning. It avoids the sudden problems that would be faced if the colleague leaves immediately should they consider they cannot continue working full time.</p>	
 <p>Integration</p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>Colleague well-being is at the centre of this proposal.</p>	

**3. Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below. For more detailed information on the protected characteristics, the Equality Act 2010 and the Welsh Language Standards that apply to

Monmouthshire Council please follow this link:<http://hub/corporatedocs/Equalities/Forms/AllItems.aspx> or contact Alan Burkitt on 01633 644010 or [alanburkitt@monmouthshire.gov.uk](mailto:alanburkitt@monmouthshire.gov.uk)

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Consider the impact on our community in relation to this e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.	n/a	Managed succession planning will be beneficial to employment and training.
Disability	What issues are there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this, producing information in alternative formats, employment issues.	n/a	n/a
Gender reassignment	Consider the provision of inclusive services for Transgender people and groups. Also consider what issues there are for employment and training.	n/a	n/a
Marriage or civil partnership	Same-sex couples who register as civil partners have the same rights as married couples in employment and must be provided with the same benefits available to married couples, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance	n/a	n/a

<b>Protected Characteristics</b>	<b>Describe any positive impacts your proposal has on the protected characteristic</b>	<b>Describe any negative impacts your proposal has on the protected characteristic</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
Pregnancy or maternity	<i>In employment a woman is protected from discrimination during the period of her pregnancy and during any period of compulsory or additional maternity leave. In the provision of services, goods and facilities, recreational or training facilities, a woman is protected from discrimination during the period of her pregnancy and the period of 26 weeks beginning with the day on which she gives birth</i>	n/a	n/a
Race	<i>Think about what the proposal will do to promote race equality with the aim of: eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between persons of different racial groups. Also think about the potential to affect racial groups differently. Issues to look at include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy &amp; Traveller, migrant communities and recording of racist incidents etc.</i>	n/a	n/a
Religion or Belief	<i>What the likely impact is e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.</i>	n/a	n/a

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex	<i>Consider what issues there are for men and women e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues. Will this impact disproportionately on one group more than another</i>	n/a	n/a
Sexual Orientation	<i>Consider the provision of inclusive services for e.g. older and younger people from the Lesbian, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.</i>	n/a	n/a
Welsh Language	<i>Under the Welsh Language measure of 2011, we need to be considering Welsh Language in signage, documentation, posters, language skills etc. and also the requirement to promote the language.</i>	n/a	n/a

4. Council has agreed the need to consider the impact its decisions has on important responsibilities of Corporate Parenting and safeguarding. Are your proposals going to affect either of these responsibilities? For more information please see the guidance <http://hub/corporatedocs/Democratic%20Services/Safeguarding%20Guidance.docx> and for more on Monmouthshire's Corporate Parenting Strategy see <http://hub/corporatedocs/SitePages/Corporate%20Parenting%20Strategy.aspx>

	Describe any positive impacts your proposal has on safeguarding and corporate parenting	Describe any negative impacts your proposal has on safeguarding and corporate parenting	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Safeguarding	<i>Safeguarding is about ensuring that everything is in place to promote the well-being of children and vulnerable adults, preventing them from being harmed and protecting those who are at risk of abuse and neglect.</i>	n/a	n/a



Corporate Parenting	<i>This relates to those children who are 'looked after' by the local authority either through a voluntary arrangement with their parents or through a court order. The council has a corporate duty to consider looked after children especially and promote their welfare (in a way, as though those children were their own).</i>	n/a	n/a
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**5. What evidence and data has informed the development of your proposal?**

<p>This report is founded upon the following:</p> <ul style="list-style-type: none"> <li>• The Medium Term Financial Plan and 2017/18 budget proposals;</li> <li>• 1:1s with team members and feedback via Team meetings.</li> </ul>
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**6. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

The proposed flexible early retirement is intended to ensure a resilient and improving service with succession planning and staff retention. The impact should be positive with no negative impacts identified other than the financial cost, which will be met within existing budgets.
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**7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

What are you going to do	When are you going to do it?	Who is responsible	Progress
Implement the proposed restructure, subject to Cabinet Member approval. This will allow for succession planning and staff development.	By 01/05/2017	Head of Service	Awaiting approval.

**8. MONITORING: The impacts of this proposal will need to be monitored and reviewed. Please specify the date at which you will evaluate the impact, and where you will report the results of the review.**

The impacts of this proposal will be evaluated on:	October 2017 via Annual Performance Report, March 2018 via Annual Appraisals
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9. **VERSION CONTROL:** The Future Generations Evaluation should be used at the earliest stages of decision making, and then honed and refined throughout the decision making process. It is important to keep a record of this process so that we can demonstrate how we have considered and built in sustainable development wherever possible.

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.	<i>Submission of Cabinet Member report</i>	<i>April 2017</i>	<i>This will demonstrate how we have considered and built in sustainable development throughout the evolution of a proposal.</i>

