



# Staff Manual

April 2024

Nothing about you

without you

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# Part 1 – Joining Sage Advocacy

## A welcome note from the Management Team

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Welcome to Sage Advocacy!

When you work for Sage Advocacy, you are working towards an Ireland where the rights of older people, vulnerable adults and healthcare patients are protected and where people are enabled to express their will and preferences in relation to their lives.

Our aims are ambitious, yet through each of our collective work, we edge closer to that each day.

*Sage Advocacy is aiming to build a team capable of people capable of tackling the most complex and challenging issues faced by vulnerable adults, older people and healthcare patients.*

Sage Advocacy aims to be a 'great place to work' and attract, retain and develop talented and committed employees, trustees and volunteers. This manual represents some of our commitments to each employee to support that aim.

The manual sets out the benefits of working with Sage Advocacy, the policies and procedures that we have developed and the ways in which Sage Advocacy can support you in your work. The manual allows us to ensure the consistent, clear and equal treatment of workers.

We truly hope that you enjoy working for Sage Advocacy, that you feel rewarded in knowing that you are doing important work to support people who may be experiencing exclusion, are in a vulnerable situation or who have not had their voices heard.

We sincerely hope that you enjoy your time working with Sage Advocacy.

Regards,



**Mary Warren**

Operations & Governance (Asst. CEO)

**Sage Advocacy clg.**

*The Sage Advocacy approach  
To collaborate where possible,  
To challenge where necessary  
To 'go the extra mile'*

## Introduction

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The purpose of the Staff Manual is to set out the rights and responsibilities of each employee as well as the respective powers of the Board and Management Team of Sage Advocacy. The manual provides a guide for employees in relation to key organisational issues, policies, and culture.

The Staff Manual is one of a number of governance and operational documents central to the work of Sage Advocacy, including;

- Constitution of Sage Advocacy
- Board Manual
- Staff Manual
- Quality Standards
- Statement of Strategy
- Service Policies & Guidelines
- Statement of Strategy
- Operations Manual
- Work Programme
- Annual Reports
- Minutes
- Information Security Programme
- Disaster Recovery Contingency Plan

## Your First Point of Contact

Your line manager will always be your first point of contact and will be able to help you with most questions or direct you to the appropriate person.

## Your Contract

You will receive a contract, which sets out your employment terms and conditions with Sage Advocacy. Please take time to read them, your contract and this manual carefully. If you have any questions, please discuss these with your line manager.

## Employee Personal Attributes & Characteristics

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All Sage Advocacy employees must:

- Be approachable, friendly and easy to talk to; non-judgemental; sensitive to others; involving and inclusive
- Be collaborative, supportive and capable of working in a collegiate way
- Be conscious of and take responsibility for meeting deadlines
- Be respectful of people, their privacy and of their relationships with family members/social and work networks
- Be self-aware and assured without being arrogant or egotistic
- Value individual autonomy, self-determination and personal empowerment
- Be proactive and willing to take initiative regarding raising advocacy awareness among health and social care services personnel and all other providers of services to the public
- Be vigilant, attentive to instances of poor quality and standards and the status of vulnerable adults, older people and healthcare patients
- Be open to self-review, to receiving feedback and accepting support, supervision and mentoring
- Be independent and free from any conflicts of interest
- Be compassionate as well as passionate about enabling vulnerable adults, older people and healthcare patients to have their voice heard
- Be curious, creative and innovative, open to exploring different ways of doing things and problem solving whilst understanding the wider context and the possible implications of different approaches.

# The Six Quality Standards

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1.

## Respect

Reflecting the right of every person to be treated with dignity and respect, including each individual's right to privacy, confidentiality and self-determination.

2.

## Social Justice

Promoting equal treatment with other people in respect of access to basic goods, services and protections and a positive affirmation of social solidarity.

3.

## Competence and Compassion

Demonstrating high levels of skill, competency, compassion and consistency on the part of advocates.

4.

## Accessibility

Available in a manner that is convenient and easily accessible to people who require support.

5.

## Independence

Structurally, operationally and psychologically independent from health and social care service providers and representing only the will and preferences of people receiving support.

6.

## Accountability

Acting with integrity and responsibility and engaging with people who use the service and with other stakeholders in an honest and transparent manner.

## Code of Conduct for Employees

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The purpose of the Code of Conduct for employees is to set out standards of behaviour expected from employees of Sage Advocacy. You should read and be familiar with the code.

As an employee of Sage Advocacy, you should maintain the highest standards of behaviour in the performance of your duties by:

- Fulfilling your role as outlined in your contract of employment and job description to a satisfactory standard;
- Performing your duties to the best of your ability in a safe, efficient and competent manner;
- Following Sage Advocacy's policies and procedures as well as any instructions and directions within your role remit;
- Acting honestly, responsibly and with integrity;
- Treating others with fairness, equality, dignity and respect;
- Acting in a way that is in line with the purpose and values of Sage Advocacy and that enhances the work of Sage Advocacy;
- Communicating respectfully and honestly at all times with colleagues and all persons who interact with Sage Advocacy;
- Observing safety procedures, including obligations concerning the safety, health and welfare of other people, in line with training provided;
- Reporting any health and safety concerns even if it is not within your area of responsibility;
- Raising concerns about possible wrongdoing in the workplace with your line manager in line with Sage Advocacy's whistleblowing policy;
- Directing any questions regarding Sage Advocacy's policies, procedures, support or supervision to your line manager;
- Addressing any issues or difficulties about any aspect of your role or how you are managed in line with Sage Advocacy's grievance procedures;
- Keeping confidential matters confidential;
- Exercising caution and care with any documents, material or devices containing confidential information and, at the end of your employment with Sage Advocacy, returning any such documents, material or devices in your possession;
- Complying with Sage Advocacy's Information Security Programme;



- Declaring any interests that may conflict with your work or the work of Sage Advocacy <sup>1</sup>(e.g. other business interests or employment). If any doubt arises as to what constitutes a conflict of interest, you may seek guidance from your line manager;
- Undertaking relevant training to maintain and improve knowledge, skills and work practices;
- Maintaining an appropriate standard of dress and personal hygiene;
- Disclosing the fact that you have been charged with, or convicted of, a criminal offence by prosecuting authorities (or given the benefit of the Probation of Offenders Act 1907 as amended) to your line manager. This may have implications for your employment. For the avoidance of doubt, employees are not required to disclose the fact or details of ‘spent convictions’ under the Criminal Justice (Spent Convictions and Certain Disclosures) Act 2016 (as amended) to Sage Advocacy.

Employees are expected NOT to:

- Bring Sage Advocacy into disrepute (including through the use of email, social media and other internet sites, engaging with media etc.);
- Engage in any activity which may cause physical or mental harm or distress to another person (such as verbal abuse, physical abuse, assault, bullying, or discrimination or harassment on the grounds of gender, civil status, family status, sexual orientation, religion, age, disability, race or membership of the Traveller community);
- Be affected by alcohol, drugs, or medication which will affect your ability to carry out your duties and responsibilities during working hours;
- Provide a false or misleading statement, declaration, document, record or claim in respect of Sage Advocacy, its volunteers, employees or trustees;
- Take annual leave without prior approval;
- Engage in any activity that may damage property;
- Take unauthorised possession of property that does not belong to them;
- Engage in illegal activity in the workplace;
- Improperly disclose, during or after your employment with Sage Advocacy, confidential information gained in the course of your work;
- Seek or accept cash gifts, or accept rewards, benefits or hospitality of significant value from a third party in the course of your work, which might reasonably be seen to compromise your integrity or personal judgement. Nominal value gifts such as a bunch of flowers or chocolates etc. may be accepted on behalf of the organisation.
- Canvas others, directly or indirectly.

<sup>1</sup> a conflict of interest is any situation in which personal interests or loyalties could, or could be seen to, prevent the making of a decision or performance of a duty in the best interests of the charity. This personal interest may be direct or indirect, and can include interests of a connected person.

Where an employee is found to be in breach of the standards outlined in this Code of Conduct, this may result in disciplinary action up to and including dismissal in accordance with Sage Advocacy's disciplinary procedure.

The Board will review the Code of Conduct for employees at three-year intervals or as appropriate. The CEO is responsible for ensuring that this policy is implemented effectively. All other employees and volunteers, including trustees, are expected to facilitate this process.

# Sage Advocacy Statement of Roles and Responsibilities of Board and Trustees

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## Role of the Board

- To provide effective leadership within a framework of prudent and effective controls.
- To set Sage Advocacy's strategic direction in light of the mission, ethos and values that underpin it.
- To approve, monitor and review Sage Advocacy's performance framework.
- To develop a risk management strategy to ensure that organisational risks are formally identified and dealt with in the appropriate manner.
- To ensure that Sage Advocacy has the necessary resources to address its mission.

## Responsibilities of the Board

- To review, approve and monitor the implementation of Sage Advocacy's strategic and annual business plans on an ongoing basis.
- To ensure that adequate resources are put in place to enable Sage Advocacy to continue its work, and to ensure that these resources are utilised most effectively in Sage Advocacy's management.
- To review financial performance against targets and service performance against agreed standards and funding agreement.
- To leverage resources and contacts to cultivate new supporters and major donors for Sage Advocacy.
- To ensure that the Management Team of Sage Advocacy consistently adheres to and implements policy and procedure as advised by the Board and its Committees.
- To approve matters specifically reserved for Board decision, e.g. borrowings; major expenditure; major grants; and major policy initiatives.
- To monitor legal, ethical and environmental compliance.
- To protect the interests of stakeholders as a whole.
- To ensure financial records are audited in accordance with accepted accounting standards and policies.
- To approve financial records for each financial year that give a true and fair view of the affairs of Sage Advocacy.
- To monitor Sage Advocacy's performance in reducing risk.

- To ensure that policies and procedures are kept under review in order to ensure that they reflect Sage Advocacy's objectives.
- To prudently manage Sage Advocacy's affairs, taking both a long-term and a short-term view.
- To endeavour to be innovative and forward-thinking, and to adopt a long-term viewpoint and external focus.
- Working in conjunction with the Planning, Policy & Performance Committee (see below), to select and recruit Trustees and senior members of the Management Team as appropriate, including the CEO.
- To assess the Board's own performance, ensuring an adequate mix of skills and expertise, along with appropriate stakeholder representation.
- To ensure that the performance of the Management Team and of individual members is monitored and reviewed.
- To plan for orderly succession for the position of CEO.
- To allocate responsibility for specific tasks to Trustees.
- To hold Board meetings on a regular basis (at least 4 times per year) and to hold an annual general meeting.
- To meet annually with Sage Advocacy employees.

## **Board Committees**

The following are Committees of the Board:

- Policy & Performance Committee
- Compliance, Risk & Audit Committee
- Independent Complaints Review Panel

Other Committees may be set up from time to time as required.

# Statement of Roles and Responsibilities of the CEO and Management Team

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## Sage Advocacy's People

An overview of Sage Advocacy's people can be found at this [LINK](#).

## Role of the CEO

The primary purpose of the CEO of Sage is to ensure proper management and effective leadership of the organisation, in both the short and medium-term. S/he is also responsible for supporting the development of a Statement of Strategy in collaboration with the Management team and Board and for ensuring that the decisions of the Board are given appropriate effect. S/he is a major contributor to ensuring the development of the organisation and its services through, for example, providing policy suggestions for the Board's consideration, ensuring effective leadership of staff and volunteers, and developing and managing external stakeholder relationships. In addition, s/he is also the 'accountable officer' for the funding received by the organisation.

## Responsibilities of the CEO

### Resource Management and Accountability

- Managing the finances of the organisation in order to ensure that it operates within budget.
- Planning, directing, and coordinating operational activities for the organisation with the support of the Management Team, Financial Controller, Research, Legal and other advisers to deliver on the organisation's mission and vision.
- Proposing a budget to the Board each year for discussion and sign-off.
- Ensuring that the Board receives regular reports on performance, advice and recommendations so that it can take whatever decisions might be needed to change or modify its targets or otherwise ensure the organisation is 'on track'.
- Ensuring that the organisation has the right management structure, management team, skills and systems in place to carry out its work accountably and safely.
- Exploring additional funding sources and pursuing these, with the approval of the Board.
- Ensuring that the organisation is properly housed and equipped to enable it to do its work.

- Providing appropriate management and financial accounts of the organisation to the Board in a timely fashion.
- Generally ensuring compliance with all relevant laws and regulations.

### **Key Relationship Management**

- Representing and promoting the organisation at national level to various bodies with a view to promoting its services, exchanging ideas and accomplishing objectives.
- Coaching and developing the senior staff of the organisation, ensuring they are competent and supported in their work, and 'fit for purpose' for the future activity of the organisation and that all staff are adequately supported and mentored relevant to their role and responsibilities.
- Ensuring effective communication with the Board, and with staff and volunteers.
- Liaising with other statutory and voluntary players in the areas of support and advocacy for vulnerable adults and older people, to ensure collaboration and complementarity when possible and to ensure the Board is made aware of any policy or practice shifts which may be relevant.

### **Leadership, Performance and Decision-Making**

- Leading the organisation, in conjunction with the Board and staff, to develop a three-year statement of strategy for 2024 - 2026 and associated annual operational plans.
- Delivering on the organisation's agreed strategy, goals and objectives, and periodic operational or business plans.
- Making appropriate decisions to ensure the best use of resources in the implementation of the Board's stated will.
- Setting goals for staff and volunteers and ensuring all receive timely feedback.
- Reviewing operations on an ongoing basis to evaluate performance of the organisation and its staff in meeting objectives, and determining areas of potential opportunity and areas of potential risk.
- Building a strong team that is mutually supporting.

### **Organisation & Service Development**

- Developing the overall culture of the organisation to create a climate / environment that reflects the vision and values agreed for Sage.
- Growing the wider awareness of Sage across Ireland through engagement with all media and
- ensuring access among the target population of adults who may be vulnerable and older

people.

- Setting targets for growth in service reach and in the number and competence of staff and volunteers, and ensuring plans are in place to meet these targets.
- Linking with relevant organisations and institutions within the EU and internationally with the potential for strategic and / or funding benefit to Sage.
- Ensuring regular audit/review of Sage activity relative to the Quality Standards of the organisation.
- Identifying and bringing proposals for the Board's attention regarding areas of the organisation that may require improvement based on McKinsey's 7 S's model.

## **Role of the Management Team**

- To effectively coordinate and manage the work of Sage Advocacy employees and support the work of the Board and Standing Committees.
- To develop and maintain a strong and supportive culture centred on good communication and collaboration.
- To collectively address challenges that pose a risk to the people we serve, to employees or to the reputation or functioning of the organisation.
- To engage in team and skills development opportunities suggested by the Board.

## **Membership**

The membership of the Management Team consists of the CEO, Deputy CEO and Assistant CEOs. Staff of the organisation may be invited to attend to discuss specific areas of responsibility.

The team shall review its membership and terms of reference annually, at the first meeting of the calendar year.

# Part 2 - Working for Sage Advocacy

## Terms of Employment

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On starting work with Sage Advocacy, you will be given a contract of employment. Your contract, sets out your employment terms and conditions with Sage Advocacy.

The Staff Manual represents the core policies that employees of Sage Advocacy should be aware of.

## Changes to Organisational Policies

From time to time, it may be necessary for Sage Advocacy to make reasonable changes to organisational policies or work practices. Such changes may be made by way of general notice applicable to all employees or by way of specific notice to you. Work practices may include the organisation of teams, breaks or rosters<sup>2</sup>.

## Changes to Your Terms of Employment

Any variation or change to your terms and conditions of employment e.g. because of a change in law, will be notified to you in writing within one month of the date of the change(s).

Sage Advocacy will propose any other changes to the terms and conditions in your contract to you in writing, with a review date if applicable. In writing to you, Sage Advocacy will outline the reason for the change, will provide a date for you to communicate your agreement or non-agreement and outline the proposed outcome of any non-agreement to the changes.

## Recruitment Policy

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The purpose of this policy is to provide a sound framework for the recruitment and selection of employees. This policy covers all activities that form part of the recruitment and selection process. It is applicable to all recruitment except casual employees, freelance contractors and volunteers.

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<sup>2</sup> See more at

[https://www.citizensinformation.ie/en/employment/employment\\_rights\\_and\\_conditions/contracts\\_of\\_employment/change\\_job\\_contract.html](https://www.citizensinformation.ie/en/employment/employment_rights_and_conditions/contracts_of_employment/change_job_contract.html)



As an organisation, employees are our most important asset. We therefore recognise that it is crucial to recruit employees with the necessary skills, knowledge and experience to help us achieve our purpose and associated goals.

We provide appropriate support, supervision and appraisal to allow employees to realise their full potential in the workplace. We value the contributions that employees make to the aims and objectives of Sage Advocacy.

## **Recruitment & Selection**

We are committed to compliance with all relevant legislative obligations, which apply to the workplace.

Selection criteria are based on the relevant skills, qualifications, experience and potential of candidates. We provide equality of opportunity and we ensure a recruitment process free from any form of unlawful discrimination under the Employment Equality Acts 1998 - 2015.

## **Preparation**

The recruitment process should not commence until a full evaluation of the need for the role has been completed.

Authorisation from the CEO or Chair to recruit a role will be sought before commencing the recruitment process.

Canvassing or any attempt to influence the recruitment process will not be tolerated.

## **Job Description**

- A Job & Person Profile will be produced or updated for any vacant role that is to be filled.
- The Job & Person Profile will accurately reflect the elements of the role and will state both the essential and desirable criteria in terms of skills, aptitude, knowledge and experience for the job and applied equally to all candidates. Care should be taken when writing the Job & Person Profile to ensure that criteria used do not indirectly discriminate against certain groups of candidates.

## **Advertising**

Internally

Sage Advocacy will encourage promotion of its employees based on their performance and workplace conduct. Criteria for promotion include:

- Suitable experience
- High performance level
- Skillset that matches the essential criteria
- Personal motivation and willingness for a change in responsibilities

There may be no need to advertise in some situations, for example, where a position requires specialised expertise and it has been identified that the nominated individual is the most suitable person for that position or where executive decisions must be made to preserve operational integrity of the service.

Externally

All vacancies advertised externally will be placed on the Sage Advocacy website, in addition to any other external platforms.

All advertising must be cost effective and agreed in advance by the CEO or Chair.

## **Selection of Candidates**

Shortlisting will be carried out by a minimum of two people to avoid bias, one of whom would normally be the line manager.

Notes of the shortlisting decisions for each candidate will be recorded by each member of the panel.

All candidates (internal and external) will be assessed objectively against the selection criteria set out in the Job & Person Profile and only candidates who meet all the essential criteria will be shortlisted.

## **Interview**

Interviews will normally be carried out by a minimum of two people, one of whom should be the line manager. Initial short screening interviews may be carried out online in order to identify suitable candidates for second round interviews. Internal interview panels will include an external member.

Interview questions and the structure of the interview will be consistently applied to all candidates and will be based on the Job & Person Profile. Notes will be recorded for reference. Unsuccessful candidates will receive notification of the outcome of the process and feedback

will be provided to unsuccessful candidates who request it.

## **Reference Checks**

References checks and any verification of qualifications, which involves contact with third parties will only take place once Sage Advocacy forms a clear view that it would like to recruit a particular candidate.

Sage Advocacy will always request the permission of the candidate in advance of checking references or qualifications. Reference checks for every candidate are carried out in the same way. It is the policy of Sage Advocacy to seek at least two references. References will be taken be by discussion directly with the referee, where possible, and a record kept of the conversation.

## **Making the Appointment**

It is desirable to make a conditional verbal offer shortly after the selection process. Appointments will usually be made at the starting point of the advertised salary scale unless directly relevant experience or a particular area of experience or expertise is being sought, that would justify additional increments.

Once a conditional offer has been made and accepted, a written offer will be made, (on a provisional basis, subject to checking of references, Garda Vetting and verification of qualifications if applicable).

Due to the nature of the service provided there is an onus on Sage Advocacy to ensure that successful candidates take up duty without undue delay. Sage Advocacy reserves the right to withdraw the offer of employment should candidates fail to meet reasonable time frames.

Once all conditions are satisfied the appointee will be issued with a contract of employment for signature. The candidate will not be appointed to a position until a signed contract of employment is returned.

## **Candidate Obligations**

Candidates should note that canvassing, either directly or indirectly, will disqualify you and will result in your exclusion from the process.

## **Confidentiality & Data Protection**

Sage Advocacy respects the right to privacy and confidentiality of our employees and

prospective employees. Sage Advocacy may from time to time in the course of administering its business, and exercising its legal rights and performing its legal obligations in connection with the recruitment of employees, need to process both personal data and special categories of personal data (including, for example, information relating to health). Sage Advocacy will process such data in accordance with the applicable data protection legislation including the General Data Protection Regulation and implementing legislation. Further details in relation to what personal data is collected in relation to employees or prospective employees, and the purposes for which such data may be used are set out in Sage Advocacy's Data Protection & Information Security Programme.

## **Training and Development**

Employees undergo an induction that provides information appropriate to their role. Every employee will be provided with:

- A job description;
- Information about the vision, mission and organisational structure of Sage Advocacy;
- Information about how the employee's role fits within the broader purpose of Sage Advocacy;
- Information about the employee's line manager and key contacts within the organisation;
- Details of working conditions;
- Sage Advocacy's Staff Manual;
- Quality Standards;
- An opportunity to ask any queries that they may have about their role.

An appropriate level of training is provided to all employees to assist them to work in a safe and effective manner.

## **Probationary Period**

During a probationary period, normally 6 months, an employee's overall suitability for a role is assessed. Probation is intended to be a positive, collaborative process, which provides an opportunity to allow for the newly appointed or promoted employee to move into the role and/or organisation and for a fair assessment of an employee's performance and suitability to the role.

During a probationary period, you will meet regularly with your line manager (at least every 2 months) and feedback on your performance and progress will be discussed. The Sage Advocacy Probation & Performance Review Form can be accessed in the library on SharePoint at this [LINK](#).

Where there are concerns relating to performance and suitability, you will be advised by your line manager at the earliest possible stage including specific examples.

Prior to the end of the probationary period, the line manager will recommend to the CEO that;

- An individual has met the expected standard of performance and should be offered continued employment; or
- That the probationary period should be extended; or
- That the individual has not met the expected standard of performance during probation.

In each case, Sage Advocacy will write to you to inform them of the result of your probationary period.

## **Support, Supervision & Appraisal**

Employees have access to support, supervision, appraisal and mentoring during the probationary period and throughout their employment period. The Sage Advocacy One to One Session Form can be accessed in the library on SharePoint at this [LINK](#).

Difficulties that arise will be dealt with in a fair, open and efficient way and in line with Sage Advocacy's grievance and disciplinary procedures.

## **Payment**

Remuneration is payable monthly. Remuneration will be paid by electronic transfer to a bank or building society account nominated by you. Sage Advocacy reserves the right to alter the method or interval of payment at their discretion.

Employees will receive a payslip showing how the total amount of your pay has been calculated. It will also show the deductions which have been made and the reasons for them, e.g. PAYE, PRSI, etc.

You may, as provided for in the National Minimum Wage Act 2000, request from the employer a written statement of your average hourly pay.

In addition to your remuneration, you will be reimbursed all reasonable expenses, properly, wholly and exclusively incurred by you and authorised by your line manager in the discharge of your duties under this contract upon production of receipts or other evidence for them as Sage Advocacy may reasonably require, please refer to the Expense Policy.

Any pay queries should be raised with the Financial Controller by contacting [accounts@sageadvocacy.ie](mailto:accounts@sageadvocacy.ie).

## **Overpayments**

If you are overpaid for any reason, the total amount of the overpayment will normally be deducted from your next payment but if this would cause hardship, arrangements may be made for the overpayment to be recovered over a longer period.

If you notice an overpayment, you should inform the Financial Controller by contacting [accounts@sageadvocacy.ie](mailto:accounts@sageadvocacy.ie), immediately. A deliberate failure to advise the financial controller could be regarded as a disciplinary matter.

## **Deductions**

Sage Advocacy reserves the right at its absolute discretion to deduct from your pay any sums which you may owe Sage Advocacy including, without limitation, any overpayments made to you by Sage Advocacy or losses suffered by Sage Advocacy as a result of your negligence or breach of Organisation rules. This will serve as statutory notice for the purposes of The Payment of Wages Act, 1991.

## **Income Tax and Social Insurance**

It is your personal responsibility to ensure that you are paying the correct income tax. At the end of each tax year, the total pay you have received from us during that year and the amount of deductions for PAYE and PRSI can be obtained by logging onto your personal “myAccount” online with Revenue.

## **Personal Details**

It is important that Sage Advocacy maintain accurate details of employees and it is a condition of employment that you notify management within one week of any relevant change in your personal circumstances, in particular (without limitation), the following:

- Name
- Address and telephone number
- Banking details

- Contact in case of emergency and/or contact details for same
- Circumstances which may affect your availability during working hours
- Circumstances which may affect your ability to perform your duties efficiently
- Any criminal charge (including motor offences)
- Any criminal conviction (including motor offences.)

## Expense Policy

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### Employee Expenses

Sage Advocacy has a comprehensive Expense Policy which is available to access in the library on SharePoint at this [LINK](#).

It is Sage Advocacy's policy that no employee should be out of pocket for any reasonable expenses incurred while working or travelling for Sage Advocacy. Employees' expense will be reimbursed in defined circumstances.

## Leave from Work Policy

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### HRLocker Leave System

Sage Advocacy uses HRLocker, a cloud-based people management system to manage leave, timesheets, training and HR records.

HRLocker can be accessed remotely using your mobile phone, laptop or tablet allowing you access to view your profile and your leave entitlements from anywhere.

You will receive an invite and training on the system from the Operations & Governance (Asst. CEO).

Your personal details and in case of emergency contact are an employee's responsibility so please ensure they are filled out in the personal tab in HRLocker before commencing work and keep updated accordingly.

### Timesheets

You are required to submit weekly timesheets through HRLocker which will be approved by your line manager.

## **Annual Leave**

Your entitlement to annual leave or holidays from work is outlined in your contract of employment.

In addition, you will be entitled to the public holidays recognised in Organisation of Working Time Act, 1997. If you are required to work on a public holiday, prior consultation will take place and a day off in lieu of the public holiday will be agreed.

All holidays should, in so far as is possible, be taken during the holiday year which runs from 1st January to 31st December and there is no provision for payment in lieu of holidays unless you are leaving Sage Advocacy. A maximum of five days annual leave can be carried over to the following year. Carried over leave must be used in quarter 1.

All annual leave requests should be submitted through HRLocker and approved by your line manager. Do not plan annual holidays where your annual leave request has not been approved.

## **Absence from Work**

In the event of an absence from work you are required to notify your line manager as early as possible on the first day of absence and, if possible, advise of its likely duration and if you intend to work from home. If you are on sick leave and absent from work in excess of two days, a medical certificate is required. Please forward the medical certificate to your line manager and the administrator.

## **Sick Leave Policy**

Sick leave is defined as an absence from work due to illness when an employee would normally be working.

Sage Advocacy understands that from time-to-time employees may experience illness which requires time off work. Sage Advocacy understands that working while sick can be counter-productive to the overall health of an employee and their colleagues and the work of Sage Advocacy. For this reason, Sage Advocacy believes that making provision for a period of paid sick leave is in both an employee's interests and the interests of Sage Advocacy as a whole.

In order to avail of paid sick leave, you must follow the Sage Advocacy procedure for notification of absence periods.



You will be asked to participate in a return-to-work interview after any period of illness. Where the absence is short, a brief check-in with a line manager is sufficient, however where a longer period of certified illness has been taken, a meeting with a line manager should be held which records an employee's wellness and ability to return to work.

Where an employee has a period of illness in excess of 6 weeks in a 12-month period, Sage Advocacy may do a fitness to work review.

A fitness to work review may also be carried out where Sage Advocacy has documented concerns as to;

- An employee's health which may limit or prevent them from performing the job effectively,
- Whether the work environment is unsafe to an employee personally,
- The individual's condition may make it unsafe both for themselves and for others in some roles,
- An employee's health or condition may pose a risk to the community.

Should a review be necessary, Sage Advocacy will engage a medical practitioner at Sage Advocacy's expense. A review will be confined to fitness for the proposed job and only medical questions relevant to the employment will be asked. Sage Advocacy is committed to making all reasonable accommodations possible to ensure that employees are supported to carry out their functions.

Periods of absence for 2 days or less, do not require a medical certificate, however employees must produce a medical certificate for periods of sick leave of more than 2 days (i.e. on the 3rd day), outlining the start date and anticipated return to work date (where possible). Subsequent certificates are required to be sent at weekly intervals thereafter.

All employees who have successfully completed their probationary period, may be paid sick pay by Sage Advocacy at their basic salary rate for up to 6 days' uncertified sick leave in an annual period. In addition, Sage Advocacy will pay up to 6 weeks certified sick leave sickness absence in any 12-month rolling period. An employee must apply to the Department of Social Protection for Illness Benefit and should claim Illness Benefit from the first day of absence from work and no later than 6 weeks of becoming ill. To be eligible for Illness Benefit, you must be under 66 and meet the social insurance (PRSI) conditions.

From 1st March 2021, the number of waiting days to apply for Illness Benefit is at 3 days. No payment is made for the first 3 days of illness, which are known as waiting days.

The Illness Benefit is payable to Sage Advocacy or may be deducted from the individual's

salary during the 6-week period that Sage Advocacy continues to pay full salary.

Illness Benefit is paid for a maximum of:

2 years (624 payment days) if you have at least 260 weeks of social insurance contributions paid since you first started work

or

1 year (312 payment days) if you have between 104 and 259 weeks of social insurance contributions paid since you first started work.

For part-time employees, sick leave entitlement will be calculated on a pro-rata basis.

The Sage Advocacy Sick Leave Policy remains at the discretion of Sage Advocacy.

## **TOIL**

Time off in lieu is defined as an amount of time an employee and their line manager agree may be taken as compensation for any additional time an employee has been required to work beyond their contracted hours.

Time off in lieu is granted for all hours worked over your standard working day. It is counted in blocks of not less than 30 minutes and can be claimed where the additional time worked exceeds 1 hour.

Time off in lieu should be recorded on your timesheet on HRLocker and a description added to the notes section.

All time off in lieu requests should be submitted through HRLocker and approved by your line manager. Time off in lieu must be taken during a period which is mutually agreed between the employee concerned and Sage Advocacy. Employees can view their accumulated time off in lieu on HRLocker. Time off in lieu must be used within three months of the date it was accrued. Unsubmitted time off in lieu requests will expire biannually (30th June & 31st December).

## **Medical / Dental Appointments**

With regards to personal appointments, wherever possible routine doctor, hospital, dentist, optician or other necessary medical appointments should be arranged outside working hours.

If this is not possible every attempt should be made for the appointment to be at the beginning or end of your working day. Appointments in excess of an hour should be requested in advance through HRLocker.

## **Public & Company Holidays**

The following public holidays will be granted in addition to the annual holiday leave entitlement in accordance with Sage Advocacy of Working Time Act 1997:

- New Year's Day (1 January)
- First Monday in February, or 1 February if the date falls on a Friday (from 2023 onwards)
- Saint Patrick's Day (17 March)
- Easter Monday
- First Monday in May
- First Monday in June
- First Monday in August
- Last Monday in October
- Christmas Day (25 December)
- Saint Stephen's Day (26 December)

Sage Advocacy will be closed on Good Friday and also between Christmas and New Year. Two annual leave days will be reserved to cover the Christmas period.

## **Jury Service Leave**

Employees of Sage Advocacy are entitled to paid leave if called for jury service or summoned to appear in court as a witness. Please forward the jury service notice to your line manager.

## **Career Break**

Sage Advocacy will make every reasonable effort to accommodate career break requests, considering the needs of the organisation as well as the individual employee needs.

### **Purpose & eligibility**

All employees who have successfully completed their probationary period, are entitled to apply for a career break but there should be no expectation of it being granted.

The period of career break will be for two (2) years. You may extend this period by no more

than one (1) year to an absolute maximum of three (3) years.

## **Contractual Information**

The career break will not count as service for promotion, increment, or pension purposes. Any post to which you might return will be at the same level and terms and conditions but will not necessarily have the same title and functions as are currently envisaged.

You will be entitled to return to the role under the same terms and conditions as when the leave commenced. Any proposed changes to these terms and conditions will be addressed within twenty-eight (28) days of your return to work.

During the career break you may take up employment in the public, private or NGO sectors (with the approval of Sage Advocacy) but not in any role which is likely to impact directly on the work of Sage Advocacy. In this regard any such request from you will be dealt with in a timely fashion by the CEO in consultation with the Chair of the Board.

All access to email, phone and Sage Advocacy resources will cease during the period of the career break and any ICT equipment (mobile phone, laptop etc) belonging to Sage Advocacy will be returned.

## **Notification Requirements**

A period of six (6) months' notice must be given prior to your return to work, prior to any request for an extension of the career break, change to working schedule and in the event that you decide not to return to work with Sage Advocacy while on a career break.

## **Maternity Leave Policy**

### **Purpose & Eligibility**

Your entitlement to maternity leave and related arrangements are governed by the Maternity Protection Act, 1994.

### **Ante-Natal Care**

You are entitled to take time off during your normal working hours to receive ante-natal care, although whenever possible, you should arrange your appointments at the start or end of the working day. Ante-natal care includes appointments with your doctor, hospital and clinic. Appointments should be requested in advance through HRLocker.

## **Pay**

There will be no deduction from your salary for attendance at authorised ante-natal appointments.

## **Notification Requirements**

You can choose to start your maternity leave at any time after the start of the 12<sup>th</sup> week before your expected week of confinement (EWC). However, you must take a minimum of two weeks maternity leave before the end of the week in which the baby is due and four weeks after that week.

You must give notice in writing addressed to your line manager at least 4 weeks before you start your maternity leave. You should enclose a note from your doctor or midwife with your letter. If you are unable to give 4 weeks' notice for medical reasons, you will not lose your right to take the maternity leave providing you give notice as soon as possible.

## **Applying for Maternity Benefit**

You should apply for Maternity Benefit to the Maternity Benefit Section of the Department of Employment Affairs and Social Protection at least 6 weeks before you intend to go on maternity leave.

Maternity Benefit Section  
Department of Employment Affairs & Social Protection  
McCarter's Road  
Ardaravan  
Buncrana  
Donegal  
Ireland  
F93 CH79

Tel: (01) 471 5898  
Locall: 1890 690 690

Further information can be accessed by following the LINK  
below: <https://www.gov.ie/en/service/apply-for-maternity-benefit/>

## **Maternity Pay**

Employees are entitled to 26 weeks' maternity leave with a statutory benefit paid by the state

pending certain criteria, together with 16 weeks additional unpaid maternity leave, which begins immediately after the end of paid maternity leave.

Further information can be accessed by following the link below:

[https://www.citizensinformation.ie/en/employment/employment\\_rights\\_and\\_conditions/leave\\_and\\_holidays/maternity\\_leave.html](https://www.citizensinformation.ie/en/employment/employment_rights_and_conditions/leave_and_holidays/maternity_leave.html)

Sage Advocacy will pay employees who are on maternity leave, by topping-up of the Maternity Benefit to full pay for the period of 26 weeks.

Employees who opt to take some or all of the 16 weeks unpaid leave will not be paid by Sage Advocacy but are entitled to a credited social insurance contribution for each week of unpaid leave taken.

## **Returning to Work**

You need to give 4 weeks written notice of your intention to return to work following maternity leave. If you are exercising your right to take the additional unpaid leave, you must give 4 weeks advance notice in writing. These are the minimum periods of notice; however, if you are able to give an earlier indication it would be much appreciated.

## **Breastfeeding**

You need to give 4 weeks written notice of your intention to continue to breastfeed when you return to work. You are entitled to take 1 hour (with pay) off work each day as a breastfeeding break for up to 26 weeks after birth. This time may be taken as;

- One 60 minute break
- Two 30 minute breaks
- Three 20 minute breaks

Breaks may be longer and more frequent if agreed. Part-time workers are also entitled to breastfeeding breaks, calculated on a pro-rata basis.

## **Contractual Benefits**

When you are absent on Maternity Leave, you will be entitled to all normal contractual benefits, e.g.:

- Holiday entitlement: you will continue to accrue holidays (which may be taken before you start your Maternity Leave or within 6 months of your return to work). Please note that any holiday taken in excess of your entitlement will be recouped should you choose not

to return to work.

- Pension contribution (for employees with more than one year's service on the date basic maternity leave commences).

## **Further information**

Further information can be accessed by following the link below:

[https://www.workplacerelations.ie/en/publications\\_forms/guide\\_to\\_maternity\\_protection\\_acts.pdf](https://www.workplacerelations.ie/en/publications_forms/guide_to_maternity_protection_acts.pdf)

## **Paternity Leave Policy**

### **Purpose & eligibility**

With effect from 1 September 2016, new parents (other than the mother of the child) are entitled to 2 weeks paternity leave from employment or self-employment following birth or adoption of a child as per the Paternity Leave and Benefit Act 2016.

### **Notification Requirements**

You can choose to take paternity leave at any time in the 26 weeks following the birth or adoption. You must notify your line manager in writing that you intend to take paternity leave and provide your intended dates no later than 4 weeks before your leave. You will be required to provide a certificate from your spouse or partner's doctor confirming when your baby is due, or confirmation of the baby's actual date of birth if you apply for leave after the birth has occurred.

In the case of adoption, you must produce a certificate of placement in relation to the child.

### **Applying for Paternity Leave**

You should apply for Paternity Benefit at least 4 weeks before the date you intend to start your paternity leave. You will be able to apply for Paternity Benefit online at [mywelfare.ie](http://mywelfare.ie).

Paternity Benefit may be payable by the Department of Employment Affairs and Social Protection. Eligibility for payment will be based on the same PRSI contribution requirements as Maternity Benefit. The benefit must be claimed within 26 weeks of the date of birth or date of placement if the child is adopted and is paid for two consecutive weeks. Sage Advocacy will pay employees who are on paternity leave, by topping-up of the benefit to full pay for the period of 2 weeks.

## **Contractual Benefits**

Apart from pay and superannuation, time spent on paternity leave is treated as though you have been in employment, and this time can be used to accumulate annual leave and public holiday entitlement.

## **Further Information**

Further information can be accessed by following the link below:

<https://www.gov.ie/en/service/apply-for-paternity-benefit/>

## **Parental Leave Policy**

### **Purpose & Eligibility**

Full time employees of the Sage Advocacy with one year's service who are natural or adoptive parents are entitled to up to 26 weeks' unpaid leave per parent in line with the Parental Leave (amendment) Act 2019. Sage Advocacy may decide to postpone the benefit if satisfied that granting the leave would have a substantial adverse effect on the operation of Sage Advocacy. The postponement may be for a period not exceeding six months, to a date agreed by both parties.

### **Notification Requirements**

A minimum of 6 weeks in writing must be given to Sage Advocacy. You must take the leave before your child's 12th birthday (16th birthday for a child with a disability).

### **Contractual Benefits**

An employee who is on parental leave will still be regarded as working by Sage Advocacy and apart from an employee's right to remuneration and superannuation benefits, all other employment rights are preserved.

When commencing a period of parental leave, an employee should contact the Department of Employment Affairs and Social Protection to preserve their social insurance record and have social insurance credits kept up to date.

### **Further information**

Further information can be accessed by following the link below:



[http://www.justice.ie/en/JELR/Unpaid\\_Parental\\_Leave\\_\(Frequently\\_Asked\\_Questions\).pdf/Files/Unpaid\\_Parental\\_Leave\\_\(Frequently\\_Asked\\_Questions\).pdf](http://www.justice.ie/en/JELR/Unpaid_Parental_Leave_(Frequently_Asked_Questions).pdf/Files/Unpaid_Parental_Leave_(Frequently_Asked_Questions).pdf)

## **Parent's Leave**

### **Purpose & Eligibility**

Parent's leave entitles each parent to 7 weeks' leave during the first 2 years of a child's life, or in the case of adoption, within 2 years of the placement of the child with the family. Each parent is entitled to 7 weeks paid parent's leave for a child born or adopted on or after 1 November 2019. The leave period remains the same in the case of multiple births, for example if you have twins or if you adopt 2 or more children at the same time.

You may also qualify for a payment called Parent's Benefit during parent's leave. Parent's leave is available to both employees. [Parent's Benefit](#) is paid while you are on parent's leave from work if you have enough social insurance (PRSI) contributions. Each parent is entitled to Parent's Benefit during parent's leave. You can take 7 consecutive weeks or 7 separate weeks of leave.

### **Notification Requirements**

You must notify Sage Advocacy that you intend to take [parent's leave](#) and of your intended dates no later than 6 weeks before your leave. You then apply for Parent's Benefit at least 4 weeks before the date you start your parent's leave.

### **Contractual Benefits**

An employee who is on parent's leave will still be regarded as working by Sage Advocacy and apart from the employee's right to remuneration and superannuation benefits, all other employment rights are preserved.

When commencing a period of parent's leave, an employee should contact the Department of Employment Affairs and Social Protection to preserve their social insurance record and have social insurance credits kept up to date.

## **Adoptive Leave Act 1995 (Amended 2005)**

### **Purpose & Eligibility**

Your entitlement to Adoptive leave if a child is being adopted is governed by the Adoptive

Leave Act 1995 and Adoptive Leave Act 2005.

## **Before the Adoption**

You are entitled to paid time off work to attend preparation classes and pre-adoption meetings with social workers required during the pre-adoption process.

## **Basic Adoptive Leave**

All eligible employees are entitled to 24 weeks adoptive leave no matter how long they have been employed by Sage Advocacy and no matter how many hours worked each week.

## **Extended Adoptive Leave**

Any eligible employee availing of adoptive leave may take up to 16 consecutive weeks' additional unpaid adoptive leave immediately after their adoptive leave. No payment will be made by Sage Advocacy in respect of this additional leave.

## **Notification Requirements**

You must give notice in writing, addressed to your line manager, at least 28 days before you start your adoptive leave.

## **Adoptive Leave Pay**

During adoptive leave you will be entitled to claim pay-related Adoptive Benefit, provided you satisfy the contribution conditions. If a couple are adopting a child, then only one parent is entitled to apply for Adoptive Leave. Sage Advocacy will pay employees who are in receipt of Adoptive Benefit to full pay for the period of 24 weeks.

For details, call 1890 690 690; log on to [www.welfare.ie](http://www.welfare.ie) or contact:

Adoptive Benefit Section  
Department of Social Protection  
McCarter's Road  
Buncrana  
Donegal

## **Further Information**

Further information can be accessed by following the link below:

<https://www.gov.ie/en/service/295b84-adoptive-benefit/>

## **Domestic Violence Leave**

### **Purpose & Eligibility**

Employees are entitled to domestic violence leave of 5 paid days in a 12 month period under The Work Life Balance and Miscellaneous Provisions Act 2023.

Domestic violence is defined under the Act as violence or threat of violence, including sexual violence and acts of coercive control committed against an employee or a relevant person in relation to an employee.

### **Notification Requirements**

The purpose of the leave is to assist the employee or the relevant person; to relocate or to seek medical attention; to obtain counselling; to obtain victims services; to obtain a court order; to seek legal assistance or assistance from An Garda Síochána. The leave cannot be taken in periods of less than one day.

An employee must inform their line manager as soon as possible that they need to take domestic violence leave, but no notice period is required, as the need to take domestic violence leave may not be foreseeable. No statement of facts in relation to the leave is required.

### **Further information**

Further information can be accessed by following the link below:

[https://www.workplacerelations.ie/en/what\\_you\\_should\\_know/leave/domestic-violence-leave/](https://www.workplacerelations.ie/en/what_you_should_know/leave/domestic-violence-leave/) or contacting Women's Aid 24 hour National Freephone Helpline on 1800 341 900.

## **Force Majeure Leave Policy**

### **Purpose & Eligibility**

The purpose of Force Majeure Leave is to provide paid leave in the event that a member of an employee's family (i.e. a child/adoptive child; spouse/partner; person to whom they are in loco parentis; brother/sister or parent/grandparent) has suffered an illness or injury.

All Sage Advocacy employees are eligible – but only when, due to an unforeseen event, your

immediate presence is indispensable at the place where the ill/injured person is located.

## **Policy**

Entitlement to Force Majeure Leave is limited to 3 days in any 12 consecutive months or 5 days in any 36 consecutive months. Absence for part of a day is counted as one full day of leave.

## **Notification Procedure**

An employee who is required to take Force Majeure Leave must inform their line manager as soon as is reasonably practicable of the need and the reason for taking such leave. Thereafter, an employee must complete the Force Majeure Leave notice document on their return to work. (See sample form at the end of this handbook.)

## **Abuse of Leave**

If Force Majeure Leave is found to have been taken for any reason other than the above, you may be subject to serious disciplinary action, up to and including dismissal.

## **Bereavement Policy**

Bereavement leave is paid leave that allows an employee time off to deal with their personal distress, primarily when a family member dies.

- In the event of the death of an immediate relative, five working days' paid leave will be granted. An immediate relative includes a spouse, child, parent, sister, brother, father-in-law, mother-in-law or a person with whom you are in a relationship of domestic dependency.

The following should be noted:

- Spouse also includes a partner with whom an employee is co-habiting, but who is not your legal spouse.
- Child also covers children in respect of whom you are the adoptive parent or is 'in loco parentis'.
- Relationship of domestic dependency is as defined by the Parental Leave Amendment Act 2006: A person who resides with an employee is taken to be in a relationship of domestic dependency with you if, in the event of injury or illness, one reasonably relies on the other to make arrangements for the provision of care. Note: The sexual orientation of the persons concerned is immaterial.

- Three days' leave will be allowed on the death of a mother/father-in-law, grandparents, grandchildren, son/daughter-in-law.
- One day's leave will be allowed on the death of an uncle/aunt to facilitate attendance at the funeral.
- In exceptional circumstances, three to five days leave may be granted on the death of someone outside the immediate family. These circumstances would include where you are responsible for funeral arrangements or have to travel abroad to attend the funeral.

An employee should notify their manager of their intention to take leave under this policy as soon as possible, or, at latest, on the first day of absence. Line managers have the right to exercise discretion in exceptional circumstances as outlined above. Leave days must be taken consecutively.

### **Annual Leave**

In the event of a death of an immediate relative, an employee may be facilitated in taking annual leave at short notice to supplement their bereavement leave. Requests should be directed to your line manager.

An employee who suffers a family bereavement whilst on annual leave, and who has to disrupt or cancel leave plans, can avail of bereavement leave and take their displaced annual leave at a future date.

### **Unpaid Leave**

Unpaid leave on compassionate grounds up to a maximum of one month may be granted for the purpose of coping with family difficulties arising from bereavement, loss or relationship breakdown. An employee should consult with their line manager.

### **Return to Work**

In certain circumstances a full return to work may not be possible for an employee following the death of an immediate relative, for example where new child-care arrangements have to be sourced or responsibility for the care of an elderly parent has transferred to you.

In such instances it may be possible to facilitate a phased return to work on a part-time or reduced hours basis. Any such arrangement would need to be agreed in advance you're your immediate manager or CEO, and would be subject to a maximum duration and review.

### **Employee Support**

Sage Advocacy acknowledges that bereavement leave is intended to support employees in the immediate period around the death of a relative. However, the process of grief, the natural reaction and adjustment to loss and change, may take a significant time to work through and will be personal to each individual.

An employee with any concerns about the grieving process impacting on their work performance should discuss this in confidence with their line manager to ensure the necessary support is in place.

Sage Advocacy recognises that the majority of people do not require counselling to cope effectively with their grief. However, some employees may wish to avail of professional help in coming to terms with a significant loss.

## **Health and Safety**

The health and safety assessment of the workplace should include a consideration of the impact of bereavement on an employee, their duties, and the context in which they are working.

Any employee concerned about their ability to safely conduct their duties in the weeks following the loss of an immediate relative, should discuss this with their line manager. Line management reserves the right to request an employee to undergo a medical check before resuming full duties.

## **Data Protection & Information Security**

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### **Purpose and Scope**

Sage Advocacy has a robust Information Security Programme in place, which incorporates all of our Data Protection Policies. It must be adhered to at all times by employees, Sage Reps, interns, Trustees & Committee Members and consultants who use Sage Advocacy computing hardware and software. It details our position on data & computer security and user responsibilities in order to ensure that systems and information are secure and run smoothly as well as to comply with all relevant legislation.

There are various pieces of legislation that impact on, or can be breached through the use of computer, email and internet applications, including those relating to copyright, data protection, defamation, harassment and criminal law.

The following is a summary of our related policies. Non-compliance with this Information Security Programme could lead to disciplinary action, or, in some cases, dismissal.

## Acceptable Use Policy

Each individual is responsible for exercising good judgment regarding appropriate use of company resources in accordance with the Organisation's policies, standards, and guidelines. The Organisation's resources may not be used for any unlawful or prohibited purpose.

Internet access is provided to authorised users and will be monitored on a systematic basis by the company. There should be no unauthorised downloading of any software, all software downloads will be done through the IT Manager. You may not use Sage Advocacy's network or access to the Internet in any way that violates Irish laws. To access, download or transmit any indecent, obscene, pornographic, racist, defamatory or other inappropriate material as well as the circulation of such materials will be a dismissible offence. This rule will be strictly enforced and is viewed as extremely serious with potential criminal liabilities arising therefrom. The Gardai or other appropriate authority will be informed where appropriate.

Use of company Internet access facilities to commit infractions such as misuse of company assets or resources, sexual harassment, unauthorised public speaking and misappropriation or theft of intellectual property are also prohibited by general company policy, and will be sanctioned under the relevant provisions of the terms and conditions of employment.

## Bring Your Own Device (BYOD) & Remote Access Policy

Protecting the information and assets controlled and processed by the Organisation is paramount to our business and promotes trust with our clients and customers. Controlling the use of BYOD enables us to maintain a secure and robust infrastructure and protects the integrity of the Organisation. *All users are required to:*

- Enable and keep up-to-date all security features and software on the device
- Utilise strong credentials for login authentication
- Activate the lock screen function whenever the device is left or not in use and ensure that unlock necessitates a re-login
- Activate and use encryption services and anti-virus protection on all devices
- Users are expected to use their devices in an ethical manner at all times and adhere to the Organisation's Acceptable Use Policy

## Clear Desk & Screen Policy

At the end of the working day, all employees are expected to tidy their desk and to tidy away all office papers into locked desk drawers and filing cabinets. All laptops and PC's provided by Sage Advocacy have screensavers which activate after a period of inactivity, requiring a password to re-establish access. Our mobile phone devices use automatic lock activation requiring a pin/pattern to re-gain access. These features must not be deactivated without approval from the IT Manager.

## Email Usage & Archiving Policy

All Sage Advocacy employees are issued with a unique Sage Advocacy email address. The format for Sage email is [firstname.lastname@sageadvocacy.ie](mailto:firstname.lastname@sageadvocacy.ie). All communication containing personal, sensitive or organisational data is to be conducted through the official secure Sage Advocacy email service provided by Microsoft Office 365. The Sage Advocacy email address provides access to Sage Advocacy's permission-based file sharing structure through Microsoft Office 365. Support to access Sage Advocacy email is provided by the IT Manager.

Employees must only access their own business email and must not share or disclose logins or passwords. Employees must report any unusual or flagged email messages to the Information Systems Officer immediately on 086 1427 897, or [lara.gallagher@sageadvocacy.ie](mailto:lara.gallagher@sageadvocacy.ie). The organisation email should only be used for legitimate business use.

Where any email contains personal information in the form of an attachment (*i.e. medical invoices, passports copies, birth certificates etc*), these attachments are uploaded manually to our Salesforce database system.

## Social Media Policy

Sage recognises that social media offers a platform for the company to perform marketing, stay connected with stakeholders and build its profile online. Sage also believes its employees should be involved in conversations on social networks. Social media is an excellent way for employees to make useful connections, share ideas and shape discussions.

Employees should spend time becoming familiar with the social network before contributing. If unsure, don't post it. Staff should be cautious when posting to social networks. Be thoughtful and polite. Many social media users have got into trouble simply by failing to observe basic good manners online. Employees should adopt the same level of courtesy used when communicating via email.

## Access Control & Password Policy

Each employee is responsible for the security of data, accounts, and systems under their control. Keep passwords secure and do not share account or password information with anyone, including other personnel, family, or friends. Providing access to another individual, either deliberately or through failure to secure its access, is a violation of this policy. Administrators of IT systems may have access to passwords where necessary.

## Data Breach & Policy Procedure

Sage Advocacy is committed to our obligations under the regulatory system and in accordance



with the GDPR maintains a robust and structured program for compliance and monitoring. Although we understand that not all risks can be mitigated, we operate a robust and structured system of controls, measures and processes to help protect data subjects and their personal information from any risks associated with processing data. The protection and security of the personal data that we process is of paramount importance to us and we have developed data specific protocols for any breaches relating to the GDPR and the data protection laws.

As soon as a data breach has been identified, it must be reported to the direct line manager and the Data Protection Officer immediately so that breach procedures can be initiated and followed without delay. Reporting incidents in full and with immediate effect is essential to the compliant functioning of the Organisation and is not about apportioning blame. These procedures are for the protection of the Organisation, its employees, customers, clients and third parties and are of the utmost importance for legal regulatory compliance.

## **Subject Access Request (SAR) Policy & Procedure**

The Organisation needs to collect personal information to effectively and compliantly carry out our everyday business functions and services and, in some circumstances, to comply with the requirements of the law and/or regulations. The General Data Protection Regulation (GDPR) gives individuals the right to know what information is held about them, to access this information and to exercise other rights, including the rectification of inaccurate data. The GDPR is a standardised regulatory framework which ensures that personal information is obtained, handled and disposed of properly.

If you directly receive an SAR from a client or a member of the public, please inform the Data Protection Officer immediately.

## **CCTV Policy**

Closed Circuit Television Systems (CCTV) are installed at the front door of the premises under the control of Sage Advocacy to provide for the protection, safety & security of all employees and contractors of the Organisation and of all visitors to the Organisation's property. The images may then be recorded on video tape or DVD or other digital recording mechanism. Requests to view and/or copy this data may be made by a Superintendent of An Garda Síochána if there is a criminal investigation.

## **Cyber Security Reminders**

Cyber security threats come in the form of spam, junk, phishing, malware, etc.

- The notice below appears at the top of an email when it originates outside of the organisation. Please ensure you know the identity of the sender before clicking on any

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

links contained in an email.

- Never disclose your password or personal details to anyone online unless you have verified their identity.
- Sage Advocacy will NEVER ask you to make a purchase/payment without authorisation from the CEO, so please do not respond to any requests and forward any such request to the IT Manager. Sage Advocacy will not be in a position to reimburse you for any expenditure of this kind.
- Use strong, separate passwords for each of your accounts.
- Keep devices updated.

Our Data is stored and backed-up to our cloud services



We use Webroot Endpoint Protection to prevent malicious software and viruses

Our mobile phones, laptops and computers are kept up to date



We use password protection and multi-factor authentication on our accounts



We have strict levels of permissions to access our shared systems

We provide online cyber-security training to employees, volunteers, Trustees and Committee Members



## Grievance Procedure

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A grievance is a complaint that an employee has concerning terms and conditions of employment, working environment or working relationships.

All employees have the right to raise any matter with their immediate manager or then if not satisfied with the answer received, to appeal to the CEO. The following procedure outlines the method by which employees can exercise this basic right.

### Stage 1

The grievance is raised in the first instance between you and your manager or, where this is not appropriate, the Assistant CEO or CEO.

In the case that the CEO has a grievance, this should be made directly to the chairperson of the Board. In the case that the CEO's grievance cannot be resolved at Stage 1, the Chairperson of the Board should nominate a director(s) from the Board to hear an appeal.

### Stage 2

Failing resolution at Stage 1, you (accompanied by a colleague, if desired) should discuss the issue with your manager and the Assistant CEO or CEO.

The CEO may ask you to meet with the organisation's Mentor & Support Person so that you can receive support and discuss your grievance.

### Stage 3

Should the problem remain unresolved after Stage 2, you may appeal to the Chairperson of the Board of Trustees. At this stage you, again accompanied as previously, may request the Trustees to review the grievance and to decide on the issue. In the event that the Trustees are unable to hear the appeal, an individual Director may be nominated by the Board to do so.

The objective of all parties should be to resolve the problem at the earliest possible stage of this procedure. Where it is necessary to progress a problem through the procedure, this will be done as speedily as possible.

# Disciplinary Procedure

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## Purpose and Scope

Sage Advocacy will work with its employees to ensure that the standards expected of them in their conduct, attendance and job performance are clear and that they are supported to attain them. Disciplinary processes will only be taken where Sage Advocacy believes that reasonable efforts to support employees have not been successful or the matter is sufficiently serious to warrant the immediate use of the procedure, below. This may include advising an employee of the availability of the mentoring and support service.

Sage Advocacy knows that disciplinary processes can be upsetting and the focus of the disciplinary process will be on the improvements required. This procedure is designed to help and encourage all employees to achieve and maintain standards of conduct, attendance and job performance.

## Principles

- All efforts to resolve matters informally should be exhausted in the first instance.
- No disciplinary action will be taken against an employee until the matter has been fully investigated. All breaches of behaviour or conduct are considered as alleged, until fully investigated.
- In some cases, it may be necessary for an individual to be suspended on a precautionary basis until the investigation has been completed. Full pay will be maintained during the suspension period.
- At every stage in the procedure you will be advised of the nature of the complaint against you and you will be given the opportunity to state your case before any decision is made.
- At all stages you will have the right to be accompanied by a work colleague of your choice during the disciplinary interview.
- No employee will be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty may be dismissal without notice or payment in lieu of notice.
- You have the right to appeal against any disciplinary penalty imposed.
- The disciplinary procedure may arise following a performance review process, where performance matters cannot be addressed through that process.
- The disciplinary procedure may be implemented at any stage if an employee's alleged misconduct warrants such action.

## **The Disciplinary Procedure**

As mentioned above, minor matters will be dealt with informally, with individual employees being advised of expectations in relation to conduct, attendance or job performance. Such preliminary warnings will not form part of the disciplinary procedure. It is expected at this stage that maximum effort should be made to mentor, guide, or in some way help the individual to bring their conduct or performance up to an acceptable standard.

Where the matter is more serious, the following procedure will be used.

### **Stage 1 – Verbal Warning**

A line manager will verbally warn you of the specific aspect of conduct, attitude, attendance or job performance which is below standard, stating clearly that this is a first warning. They will advise you of the improvements that must be made. The warning will be noted and recorded on your personnel file, and you will be advised of the right to appeal. Verbal warnings will remain noted for six months, after which time the warning will be removed – provided the problem giving rise to the warning has not been repeated during the period of the warning.

### **Stage 2 – Written Warning**

If the offence is of a serious nature; if a further offence occurs; or if performance does not improve within the timescale agreed at Stage 1, you will receive a written warning by the CEO following a meeting where you may be accompanied by a colleague.

The written warning will be recorded on your personnel file, giving details of the complaint, the improvement required and the timescale. It will warn that action under Stage 3 will be considered if there is no satisfactory improvement, and will advise of the right to appeal. Written warnings remain noted on your record for a period of twelve months, after which time the warning is removed, provided the problem giving rise to the warning has not been repeated during the period of the warning.

### **Stage 3 – Final Written Warning**

If, despite the application of Stages 1 and 2, the issue relating to work or conduct which is below standard has not improved to an acceptable level, you will receive a final written warning informing you that if there is no immediate, satisfactory and sustained improvement, dismissal may result. You will also be advised of the right of appeal.

This final written warning will be issued at a meeting with you attended by the CEO, the relevant manager. You may be accompanied by a colleague. The final written warning will be recorded (and will remain noted) on your personnel file.

#### **Stage 4 – Dismissal**

If, despite warnings in accordance with Stages 1, 2, 3, there has not been sufficient improvement, you will be dismissed. Only the CEO, with the approval of the Board can make the decision to dismiss.

In the case of the dismissal of the CEO, the Chairperson of the Board must seek the approval of the Board.

You will be provided, as soon as reasonably practicable, with written reasons for the dismissal, the date on which employment will terminate and the right of appeal.

#### **Some examples of gross misconduct:**

- Repeated failure or refusal to perform work assigned.
- Reporting for work having taken an intoxicant or unprescribed drug, and, in the opinion of the management, being unfit to carry out normal duties.
- Fighting, provoking or instigating a fight on Sage Advocacy's premises or any premises which you have to visit as part of your work.
- Threatening or intimidating behaviour.
- Indecent conduct.
- Abusive language.
- Falsifying, changing or altering in any way documents or records relevant to the business of Sage Advocacy.
- Theft, destruction or defacing of the Sage Advocacy's or a fellow employee's property or any other action of a criminal nature.
- Deliberate violation of a safety rule or engaging in an activity that puts the safety of other employees or clients at risk.
- Divulging confidential information relating to the affairs of Sage Advocacy to unauthorised persons.
- Any breaches of Sage Advocacy's Harassment Policy or Equal Opportunity Policies.
- Uploading any unauthorised software to any computer system.
- Unauthorised use of computer data.
- Disrespectful or abusive behaviour towards client or colleagues.
- Behaviour or attitudes which bring the organisation into disrepute.

## **Some examples of serious misconduct:**

- Refusal to comply with a reasonable instruction.
- Exhibit consistent poor time-keeping.
- Breaches of Information Security Programme as detailed above.
- Failure to demonstrate the qualities of Sage Advocacy staff set out in the Role Profile, including failure to participate in team work.

This list is not intended to be exhaustive but to serve as an indication of issues constituting gross misconduct and serious misconduct.

## **Appeals**

Any employee who wishes to appeal against a disciplinary decision should inform the CEO within five working days. The CEO will hear all appeals and their decision is final. At the appeal any disciplinary penalty imposed will be reviewed but cannot be increased. Any employee dissatisfied with an appeal outcome can arrange with the CEO to have the matter addressed by a relevant third party.

## **Trade Union / Collective Agreements**

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A trade union is an organisation formed to protect the rights and interests of the members it represents. Employees have a Constitutional right to join a trade union and Sage Advocacy encourages employees, who choose to do so, to join a trade union.

Although there is no statutory obligation at present for Sage Advocacy to negotiate with a union on behalf of an employee, Sage Advocacy is committed to;

- i) Engaging with a Trade Union Representative during any formal disciplinary or appeal process,
- ii) Engaging with a Trade Union Representative during any complaints process being undertaken by the employee.

Collective bargaining is a process where employees come together to seek to negotiate terms and conditions of employment. While there is no statutory obligation on Sage Advocacy to engage in collective bargaining, the right of employees to act collectively is recognised.

## **Equal Opportunities Policy**

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## Equal Opportunities Policy

Sage Advocacy is committed to providing equality of opportunity for all employees. Sage Advocacy will put in place policies and procedures which protect the dignity of employees and promote respect for others at work.

Under equality legislation discrimination based on any one of the following distinct grounds is unlawful.

These grounds are:

- Gender
- Civil status
- Family status
- Sexual orientation
- Religion (or non-religion)
- Age (does not apply to a person under 18)
- Disability
- Race
- Membership of the Traveller community

Discrimination is defined as less favourable treatment. A person is said to be discriminated against if they are treated less favourably than another is, has been or would be treated in a comparable situation on any of the grounds mentioned above.

Indirect discrimination occurs when practices or policies that do not appear to discriminate against one group more than another actually have a discriminatory impact.

Sage Advocacy requires its employees to take personal and individual responsibility to behave in a non-discriminatory way.

Sage Advocacy is committed to;

- Equal access to training opportunities,
- Equal access to employment, including newly created roles and promotional opportunities,
- Equality of opportunity and access in relation to induction, training and work experience,
- Equality in relation to terms and conditions of employment,
- The development of family-friendly work arrangements where appropriate,
- A positive working environment which upholds the respect and dignity of individuals



- and is free from discrimination, harassment, sexual harassment and bullying,
- Support and supervision of employees and volunteers on an equal basis.

Any employee who has any questions or concerns about any type of discrimination in the workplace, should bring these issues to the attention of their immediate Line Manager, or any other manager, for resolution. Employees can raise concerns and make reports without fear of reprisal.

## **Dignity at work**

Sage Advocacy's mission is to "promote, protect and defend the rights and dignity of vulnerable adults, older people and healthcare patients" and consistent with this mission is a recognition of the right of all employees to be treated with dignity and respect and a commitment to ensuring that all employees are provided with a safe working environment which is free from all forms of bullying, sexual harassment and a commitment to protecting the dignity and respect of all those who work within Sage Advocacy.

No bullying, harassment, mocking or disrespectful behaviour within Sage Advocacy or in connection with the work of Sage Advocacy will be tolerated. Complaints of bullying or harassment will always be dealt with, either in a formal or an informal way, or by alternative means.

Every employee has a duty to maintain a working environment in which the dignity of everyone is respected and a particular responsibility lies with senior management in creating a culture and environment that is free from bullying, harassment, mocking or disrespectful behaviour, including leading by example and taking preventative measures where required.

Complaints by employees or other persons in the workplace, of bullying or harassment at work, will be treated with fairness, sensitivity, respect and confidentiality (insofar as possible). A person who is accused of bullying and/or harassment is entitled to natural justice and will also be treated with fairness.

Dignity at Work applies to all employees whether permanent or fixed-term, full-time or part-time, and irrespective of length of service. This also applies to non-employees such as trustees, volunteers, contractors or suppliers.

Behaviours which occur both inside and outside Sage Advocacy's premises, such as at social functions, training events or meetings with other organisations or projects may fall under the auspices of this policy.

## Harassment, Sexual Harassment & Bullying

### Harassment

Harassment is any form of unwanted conduct, related to any of the following grounds, which has the purpose or effect of violating a person's dignity and creating an intimidating, hostile, degrading, humiliating or offensive environment for the person.

The unwanted conduct may include acts, requests, spoken words, gestures or the production, display or circulation of written words, pictures or other material.

Harassment may be targeted at one employee or a group of employees and may consist of a single incident or repeated inappropriate behaviour.

The following are examples of inappropriate behaviour which may constitute harassment:

- Verbal harassment, e.g. jokes, derogatory comments, excessive criticism, ridicule or song,
- Written harassment, e.g. text messages, e-mails or notices,
- Physical harassment, e.g. pushing, jostling or shoving,
- Intimidatory harassment, e.g. gestures or threatening poses,
- Visual displays, e.g. posters, emblems or badges,
- Persistent negative body or verbal language,
- Ostracising or isolating a person.

These examples of harassment are illustrative but not exhaustive.

### Sexual Harassment

Sexual harassment is any form of unwanted verbal, non-verbal or physical conduct of a sexual nature which has the purpose or effect of violating a person's dignity and creating an intimidating, hostile, degrading, humiliating or offensive environment for the person.

The unwanted conduct may include acts, requests, spoken words, gestures or the production, display or circulation of written words, pictures or other material.

Sexual harassment may consist of a single incident or repeated inappropriate behaviour. It may be targeted at one employee or a group of employees.

The following are some examples of inappropriate behaviour which may constitute sexual harassment:

- Physical conduct of a sexual nature, e.g. unwanted physical contact such as unnecessary touching or brushing against another employee's body,
- Verbal conduct of a sexual nature, e.g. unwelcome sexual advances, propositions or pressure for sexual activity,
- Continued suggestions for social activity outside the workplace after it has been made clear that such suggestions are unwelcome,
- Unwanted and offensive flirtations, suggestive remarks, innuendos or lewd comments,
- Non-verbal conduct of a sexual nature, e.g. the display of pornographic or sexually suggestive pictures, objects, written materials, emails, text-messages or faxes
- Unwanted or derogatory comments about dress or appearance,
- Leering and suggestive gestures,

These examples are illustrative but not exhaustive.

## **Bullying**

Sage Advocacy takes a zero-tolerance approach to bullying.

Workplace bullying is repeated inappropriate behaviour, direct or indirect, whether verbal, physical or otherwise, conducted by one or more persons against another or others, at the place of work and/or in the course of employment, which could reasonably be regarded as undermining the individual's right to dignity at work.

An isolated incident of the behaviour described in this definition may be an affront to dignity at work but as a once off incident is not considered to be bullying.

A key characteristic of bullying is that it usually takes place over a period of time. It is regular and persistent inappropriate behaviour which is specifically targeted at one employee or a group of employees. It may be perpetrated by someone in a position of authority, by employees against a manager or by employees at the same or similar level in Sage Advocacy.

The following do not constitute bullying:

- An isolated incident of inappropriate behaviour e.g. a display of anger or a conflict of views,
- Fair and constructive criticism of an employee's performance, conduct or attendance,
- Reasonable and essential discipline arising from the good management of the performance of an employee at work,

- Actions taken which can be justified as regards the safety, health and welfare of the employees,
- Legitimate management responses to crisis situations which require immediate action,
- Complaints relating to assignment of responsibilities and duties, terms and conditions of employment or other matters which are more usually dealt with under normal grievance procedure.

The following are some examples of the type of behaviour which may constitute bullying. These examples are illustrative but not exhaustive.

- Constant humiliation, ridicule, belittling – particularly in front of others,
- Verbal abuse, including shouting, use of obscene language and spreading malicious rumours,
- Hostile treatment, sustained unfriendly contact or exclusion,
- Inappropriate overruling of a person’s authority,
- Reducing a job to routine tasks well below the person’s skills and capabilities without prior discussion or explanation,
- Persistently and inappropriately finding fault with a person’s work and using this as an excuse to humiliate the person rather than trying to improve performance,
- Assigning blame when things go wrong even when he/she is not responsible.

## Guidelines Regarding Participation in Political Activity

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### 1. Introduction

In the context of local, European and general elections, the following guidelines have been developed for the staff and Board of Directors of Sage Advocacy (“Sage”).

Independent advocacy is a sensitive area of work and requires that we act independent of family, service providers and systems interests. Systems interests include involvement in political activity (as defined below). Sage staff and board members must act impartially as servants of the public where their employer is publicly funded to serve adults who may be vulnerable, older people and healthcare patients. Sage staff and board members may be viewed as public servants even if they are not directly employed through the public service.

### 2. Definitions

For the purposes of these guidelines, a political party means a party registered in the Register of Political Parties (in accordance with section 25 of the Electoral Act 1992) as a party organised to contest a Dáil or European election or both such elections.

Political activity means:

- i. to promote or oppose, directly or indirectly, the interests of a political party, a political group, a member of either House of the Oireachtas or a representative in the European Parliament, or
- ii. to present, directly or indirectly, the policies or a particular policy of a political party, a political group, a member of either House of the Oireachtas, a representative in the European Parliament or a third party, or
- iii. to present, directly or indirectly, the comments of a political party, a political group, a member of either House of the Oireachtas, a representative in the European Parliament or a third party with regard to the policy or policies of another political party, political group, member of either House of the Oireachtas, representative in the European Parliament, third party or candidate at an election or referendum or otherwise, or
- iv. to promote or oppose, directly or indirectly, the interests of a third party in connection with the conduct or management of any campaign conducted with a view to promoting or procuring a particular outcome in relation to a policy or policies or functions of the Government or any public authority, or
- v. to promote or oppose, directly or indirectly, the election of a candidate at a Dáil, Seanad, Presidential or European election or to solicit votes for or against a candidate or to present the policies or a particular policy of a candidate or the views of a candidate on any matter connected with the election or the comments of a candidate with regard to the policy or policies of a political party or a political group or of another candidate at the election or otherwise, or
- vi. otherwise to seek to influence the outcome of an election, referendum or campaign.

### **3. Guidelines**

#### **a. Guidelines for Staff of Sage**

1. Sage staff are not civil servants, but the principle applied in the civil service that '*a civil servant must maintain a reserve in political matters, in order to ensure confidence in the political impartiality of the Civil Service*' is, nevertheless important to note and is applicable to Sage staff. A link is available at **Appendix 2** to the Civil Service Code of Standards and Behaviour. An extract from Circular 09/2009 *Civil Servants and Political Activity* is at **Appendix 3** of these Guidelines. Similarly, the Health Service Executive (the "HSE") staff are required to carry out their duties in a party-politically neutral manner. An extract from the HSE Employee Handbook is at **Appendix 4**.
2. The following clause is in all staff contracts that states the following:

*During your employment with Sage Advocacy you should devote your time and attention to the business of Sage Advocacy and undertake not to engage in any other activity which is likely to prejudice your ability to serve the organization.*

3. The staff of Sage are reminded that they are obliged to comply with the Employee Handbook, as may be amended from time to time. The Conflicts of Interest policy (link available at **Appendix 1**) applies to all Sage staff, volunteers and members of governance structures. Participants at each meeting are reminded to declare if they have any conflicts of interest in relation to any issues, either by formal notice on the agenda of the meeting or by the issue being a formal agenda item.
4. Any staff being recruited into Sage must be clearly advised of our Conflicts of Interest policy and, in this context, they are required to declare if they are already candidates for political office or are likely to seek nomination to be a candidate for public office at local, national or European elections.
5. Sage staff are free to participate in political life and be members of political parties but not to run as candidates for political office while employed by Sage. In the event that an established member of staff (i.e. someone who has successfully completed their probationary period and is employed for more than 12 months) wishes to stand for election for any party, or as an independent, they are required to declare this under the Conflicts of Interest policy and to immediately seek a career break (which is for a minimum period of two years and a maximum period of three years) or resign their position with Sage. Failure to declare such candidacy is a clear breach of Conflicts of Interest policy and a serious disciplinary matter. Leave of absence or agreement to a career break can only be granted subject to the service requirements at the time and an assessment of the likely impact on the service provided to clients and no entitlement to either arrangement should be presumed.
6. Staff who are involved in political parties and who are either elected or appointed to senior positions within the national structures of their party or organization must declare their interests to their line manager who will advise the CEO, where they have not already done so. Any staff member in this situation must not participate in any Sage activities which could be perceived as a conflict of interest e.g. participating in the preparation or presentation of an Oireachtas Committee submission on an issue which they have already been involved in preparing policy materials for a member of the Committee. Any staff member in this position may be in breach of the Conflict of Interests policy and as such, may be subject to disciplinary procedures.

## **Appendix 1**

Link to Sage Advocacy Conflicts of Interest Policy:

<https://sageadvocacy.ie/wp-content/uploads/2024/03/Service-Policies-Guidelines-V01-2023-Board-Approved-07-12-23.docx.pdf>

## Appendix 2

Link to the Civil Service Code of Standards and Behaviour:

[https://prod-g2g-assets.s3.amazonaws.com/documents/Civil-Service-Code-of-Standards-and-Behaviour\\_1.pdf](https://prod-g2g-assets.s3.amazonaws.com/documents/Civil-Service-Code-of-Standards-and-Behaviour_1.pdf)

## Appendix 3

Extract from Circular 09/2009 *Civil Servants and Political Activity*

12. The nature of a civil servant's role is such that a civil servant must maintain a reserve in political matters, in order to ensure confidence in the political impartiality of the Civil Service. The restrictions placed on civil servants in relation to politics and political activity are designed to ensure that a civil servant does not do anything that could give rise to a perception that his or her official actions are in any way influenced or capable of being influenced by party political motives.

13. Civil servants...are prohibited from engaging in politics i.e. they may not contribute to public debate and may not support or oppose a candidate or party either in writing, by public debate or by contribution to the media (e.g. letter writing to newspapers, contribution to television or radio programmes, discussions on the internet, etc.), except if required to do so as part of their official duties.

14. Civil servants, other than those in the exempted categories in paragraph 13 must not speak in public on matters of local or national political controversy or express views on such matters in the media (including electronic media and the press) or in books, academic papers, articles or leaflets.

15. Civil servants may engage in voluntary, local, community or sporting affairs, where that activity is not connected to, or does not conflict with, their official duties or is not connected to politics and the activity does not conflict with the need for civil servants to behave, and to be seen to behave, in a politically impartial manner. However officers should adopt a precautionary approach when dealing with the media or making any public comment about their activities. Because of the need for civil servants to avoid the perception that their comments may be influenced by party political motives, where possible, they should notify the Personnel Officer in advance of any public comment and comply with any restrictions required by the Personnel Office. Where it is not possible to notify the Personnel Officer, the onus is on the individual officer to ensure that they do not say or do anything that could give rise to a perception of being influenced by party political motives.

## Appendix 4

Extract from the HSE Employee Handbook

15.3 Political Opinion

It is each employee's responsibility to carry out their duties in a party political neutral manner. Public political activities should not, under any circumstances, be undertaken in paid HSE hours by any employee. The HSE does not discriminate against employees on the basis of political beliefs or opinions. However, political opinion should not compromise an employee's obligations to the HSE nor should they be expressed/disseminated in the workplace.

#### 15.4 Outside Occupation

Employees should not engage in outside occupations during off duty time if they are either contractually prohibited or if such employment could be deemed to be in conflict with their employment. Employees should not engage in matters unconnected with work during work hours, unless it is provided for in their HSE employment. Involvement in other occupations during time off should not impair performance or energy on duty, be inconsistent with their employment in the public service or be outside limits set under the Organisation of Working Time Act, 1997.

## **Employee Wellbeing, Welfare and Safety**

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### **Employee Wellbeing**

Sage Advocacy's objective is to be a great place to work and to attract, retain and develop talented and committed employees, trustees and volunteers. A key aspect of achieving that ambition is to take steps to support and promote employee well-being.

As well as the initiatives listed below, Sage Advocacy encourages a culture of peer-to-peer support among colleagues, particularly in the context of remote and on the road working.

### **Peer Mental Health and Well-Being Programme**

Sage Advocacy is registered with The Wheel initiative 'I am Here'. I Am Here has multiple elements, including free online courses, expert help and support, professional activation and evidence-based measurement and evaluation. 'I Am Here' is designed to positively disrupt existing workplace cultures while empowering employees to have the courage, confidence and skills to show they care, to support their colleagues and to call for help when they need it.



Sage Advocacy encourages and invites all employee to explore the 'I Am Here' Tribe Member and/or Ambassador courses at this [LINK](#).

## **Mentoring and Support**

All employees in Sage Advocacy can access a mentoring and support service provided independently to Sage Advocacy.

Your line manager may suggest a meeting with the mentor as part of your supervision and support, or you may request a meeting, if you feel it would be beneficial.

The service is a confidential one-to-one 'space' to talk, explore, and reflect on any issue that is affecting your ability to perform well at work, whether that issue is related to work itself, to relationships at work, or to more personal matters that are affecting your work.

To avail of the service, you can access ONE session directly, without requesting it from your line manager, simply by contacting the mentor (see contact details, below). After that session, depending on the nature of the issue that you're dealing with, you may request (via your line manager) further mentoring sessions if you feel they are required, or you may be given the names of other professionals if, for example, more specialist intervention is required.

For the purpose of accounting and maintaining a record of professional development and support, Sage Advocacy management will know who has availed of the service and when the service was provided, but the content of what is discussed at the sessions will, at all times, remain absolutely confidential.

## **Contact Details of Mentor**

Hilary Maher

Email: [hilarymaher@gmail.com](mailto:hilarymaher@gmail.com)

Mobile: 087 2436538.

## **Employee Check-Ins**

Sage Advocacy has an internal WhatsApp group for all staff which is intended as a convenient way to keep in touch, distribute information including forthcoming short notice media issues and key messages to colleagues, quickly and efficiently.

Sage Advocacy mobile phones may not be used for any unauthorised WhatsApp groups.

All Sage Advocacy WhatsApp groups are subject to standard group rules.

## **Health & Safety – Procedural Guidelines**

### **Statement of Policy**

This policy sets out the safety programme of Sage Advocacy and specifies in detail the necessary arrangements made and resources provided to safeguard all employees, who, in turn, are required to cooperate fully for the success of the programme.

Sage Advocacy's objective is to endeavour to provide a safe and healthy work environment for all our employees based in the office, on the road or remotely and to meet our duties to contractors, visitors and members of the public who may wish to visit our premises or may be affected by Sage Advocacy's activities in accordance with the Safety, Health and Welfare at Work Act 2005 and associated regulations.

The success of this programme will depend on the employee's cooperation. It is therefore important that all employees read the document carefully and understand their role and the overall arrangements for health and safety at Sage Advocacy. It is our intention to review this Statement in light of experience. Employee and others are encouraged to put forward suggestions for improvements to the Statement.

Sage Advocacy also has a separate Homeworking Policy available to access in the library on SharePoint at this [LINK](#).

### **Overall Responsibility**

Overall and final responsibility for health and safety in Sage Advocacy lies with the CEO.

### **Day-to-Day Responsibility**

The CEO, or in his/her absence the Operations & Governance (Asst. CEO) has first responsibility for health and safety matters in Sage Advocacy. Duties and responsibilities for health and safety will be allocated and recorded in a clear and logical manner to ensure that everyone knows what they are responsible for and to whom they themselves are responsible.

The CEO has responsibility for responding to employee and other initiatives and is responsible for the day-to-day implementation of this policy and procedures document.

The Operations & Governance (Asst. CEO) is the appointed Fire Warden and is responsible for ensuring quick evacuation of employees from the Sage Advocacy Office. The Operations & Governance (Asst. CEO) has responsibility for monitoring compliance with the policy and for

maintaining contact with sources of advice. The Operations & Governance (Asst. CEO) is also responsible for carrying out or arranging health and safety training.

The Operations & Governance (Asst. CEO) is responsible for ensuring that Health & Safety policies are enforced and auditing the risk assessment.

Sage Advocacy will seek to appoint an alternate where practicable.

## **Individual and Joint Responsibility**

All employees, volunteers or visitors, must cooperate in order to achieve a healthy and safe workplace, and must take reasonable care of themselves and others. When someone becomes aware of a health or safety issue which they are not able to put right, they must inform the CEO immediately, or, in his / her absence, the Operations & Governance (Asst. CEO).

## **Accidents**

### **First Aid**

Sage Advocacy keeps a First Aid box in the break room in the Sage Advocacy Office. If in doubt, the emergency services should always be called to attend to accidents.

### **Recording accidents**

All injuries, diseases, dangerous occurrences and near misses which occur in Sage Advocacy must be reported to the line manager and recorded in the Accident Log Book held by the Operations & Governance (Asst. CEO). Causes must be investigated and remedial steps taken to prevent the recurrence of such incidents.

## **Fire Safety**

### **Fire Extinguishers**

Sage Advocacy provides the office with fully serviced fire detection, fire alert and firefighting equipment. Fire extinguishers should not be used to hold open office doors.

### **Fire exits**

Fire exits and escape routes are clearly marked and must be kept free of obstacles at all times.

## **Fire Drills**

Evacuation drills are organised regularly by the landlord of the Sage Advocacy Office, and the employees of Sage Advocacy must follow the instructions given.

## **Fire evacuation**

If the fire alarm is activated the office must be evacuated immediately. The meeting point for Sage Advocacy employees is the bus stop outside Ormond Meeting Rooms, 31 – 36 Ormond Quay Upper.

## **Housekeeping**

### **Cleanliness & Tidiness**

The Sage Advocacy office is cleaned once a week by an external cleaner. All spillages and similar must be attended to at once by the person responsible. All waste must be disposed of safely and quickly. The office must be free of obstacles and sufficient room for manoeuvre must be provided at all times.

### **Smoking Policy**

In line with the Public Health (Tobacco) Acts 2002-2015, it is prohibited to smoke in the Sage Advocacy office with the exception of the designated area in the car park of the building. The use of e-cigarettes or Vapes are also forbidden in the office.

### **Hazardous Substances**

Any substance which has the potential to cause a risk must be treated with due caution. Particular attention must be paid to toner, correction fluid, and glue and cleaning materials. For fire safety reasons, no candles are to be lit in the Sage Advocacy office.

### **Temperature**

Sage Advocacy provides a safe heating system in the office. The office working temperature should be comfortable and should not normally fall below 16 degrees. There must be adequate ventilation at all times, but draughts must be avoided. Radiator vents must be kept clear.

## **Lighting**

Sufficient light must be provided for working in the Sage Advocacy office, including a good level of local lighting at work-stations. Natural light should be used wherever possible, and computers should be positioned in such a way as to avoid glare.

## **Equipment, Furniture and Fixtures**

All equipment, furniture and fixtures must be in good working order and never present a danger to any user. All equipment must be used appropriately, and for the purpose for which it is intended. Filing cabinets must be loaded from the bottom drawer first, and no more than one drawer should be left open at any one time to prevent possible overbalancing.

## **Electrical Equipment**

Electrical equipment poses a particular risk and special care must be taken. Sockets must not be overloaded; there must be no trailing wires and all fittings must be in good condition. Anyone carrying out any electrical work must be competent to do so safely. All machines (photocopiers, computers, printers, shredders etc.) should be switched off when leaving the office.

## **Display Screen Equipment**

Users of display screen equipment can be equipped with safety screen filters. Employees must plan their work, ensuring that there are frequent breaks in activity.

## **Manual Handling**

Hazardous manual handling operations should be avoided wherever possible. If objects cannot be moved mechanically, by trolley or by cart, handlers must adopt a good reaching and lifting posture, sharing the weight with another person or persons if appropriate. Pregnant, elderly and disabled people are advised to take particular care when undertaking manual handling operations. Special care must be taken by anyone using ladders to reach inaccessible areas (for guidance on the correct procedure for lifting, please refer to <https://www.hsa.ie/eng/Workplace Health/Manual Handling Display Screen Equipment/FAQs/Manual%20Handling%20FAQs/Manual Handling.html>).

## **Dress Code**

Employees are expected to dress appropriately if representing Sage Advocacy and meeting

clients. Smart casual for normal work day and more formal wear for external meetings and events. At all times you are requested to exercise judgment in how you represent Sage Advocacy.

## **Environmental Responsibility**

Sage Advocacy is committed to minimising its environmental impact and the following should be adhered to wherever possible.

### **Environmental Responsibility Guidelines**

- Only print documents when necessary and use double sided printing where possible.
- Put all non-confidential paper waste in the paper recycling bins provided.
- Recycle waste where possible eg. paper, cardboard, batteries etc.
- Switch off lights and all office equipment when not in use.
- Turn down heating when appropriate.
- Switch off computers & monitors at the end of each day.
- Plug out mobile phone chargers when not in use.
- Employees are encouraged to use public transport or car pool for business use where practical and appropriate.

## **Personal Safety**

### **Violence**

Any incident in which an employee or volunteer is harassed, abused, threatened or assaulted in circumstances arising out of their employment will not be tolerated and will be dealt with severely by Sage Advocacy.

### **Working Alone**

Situations in which an employee finds him/herself working alone in the Sage Advocacy National Office should be avoided where possible. All employee should familiarise themselves with the simple procedure for setting/de-activating the alarm in the national office using the keypad situated on the wall to the left of the door to the internal hallway.

No outside contractors are to be given access to the building before 9.00 a.m. or after 5.00 p.m. or during the weekend without the permission of the CEO.

Sage Advocacy has a Working Alone Policy available to access in the library on SharePoint at this [LINK](#) which also applies to employees on the road or working remotely.

## **Handling Cash, Cheques or Gifts**

Large amounts of cash should not be handled by Sage Advocacy employee or volunteers, nor kept on the premises, in order to minimise the risk of robbery or attack.

Any cash, cheques or gifts received should be recorded on the Post Log and your line manager should be notified. Any cash, cheques or gifts should be handled in line with the Sage Advocacy Financial Controls.

For the avoidance of doubt, an Employee may not solicit or accept, directly or indirectly from any person, firm or association, anything of economic value such as a gift, voucher, gratuity or favour which might reasonably be interpreted as being of such nature that it could affect their impartiality in dealing with the donor.

Your line manager should be informed of all offers of gifts, gratuities or incentives offered to you.

## **Door Code**

Door codes will be supplied by Operations & Governance (Asst. CEO). Door codes may be changed in which case you will be notified by Operations & Governance (Asst. CEO).

## **Visitors to Premises**

Only authorised visitors are allowed in the Sage Advocacy National Office. From time to time unexpected visitors may turn up at the national office and such situations should not be held if you are working alone.

## **Key Holding**

Only authorised key holders can enter the Sage Advocacy National Office outside of normal working hours. Please contact the Operations & Governance (Asst. CEO) if access needs to be obtained and you are not an authorised key holder.

## **Information and Training**

All employees must be made aware of the health and safety implications of the work they do on behalf of Sage Advocacy, both when they join Sage Advocacy and on an ongoing basis. This

includes all issues covered by this document. If a particular training need is identified, Sage Advocacy will endeavour to ensure that this need is met.

## **Wheelchair access**

There is a wheelchair ramp stored in the stationery cupboard which can be temporarily installed for wheelchair access to the Sage Advocacy office.

## **Monitoring and Evaluation**

### **Ongoing Review**

Work practices are reviewed constantly to improve health and safety in and around the Sage Advocacy office.

### **Risk Assessment**

Sage Advocacy's Risk Register is in place and is reviewed periodically by the Compliance, Risk & Audit Committee. Where essential preventative measures are identified, these are implemented as soon as is practicable. Sage Advocacy also agrees to report to the landlord on the health and safety aspects of the building and grounds and to suggest improvements.

### **Feedback**

Sage Advocacy seeks to make ongoing improvements in the way it operates this policy and these procedures. Feedback is therefore always welcome and encouraged. It must be given to the CEO who will ensure that it is considered by the Operations & Governance (Asst. CEO) who will discuss it with the CEO.

## **Flexible Working Policy & Homeworking Policy**

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The Sage Advocacy Flexible Working Policy can be found in the library on SharePoint at this [LINK](#).

That policy recognises that an improved work-life balance can enhance employee motivation, performance, and productivity. Sage Advocacy will make every reasonable effort where possible to accommodate flexible working requests, considering the needs of the business as well as the individual employee needs.



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

The Sage Advocacy Homeworking Policy can be found in the library on SharePoint at this [LINK](#). Please familiarise yourself with the policy and do not hesitate to contact your line manager or the Operations & Governance (Asst. CEO) with any questions that you may have.

Your contract will outline your standard hours of work and the same times apply if you are home working. From time to time you may be required to work additional hours to meet organisational objectives. Except in exceptional circumstances, no employee should work more than an average of 48 (net) hours per week and every employee must have at least one complete day's rest each week.

Employees are required to follow the standard working hours. All hours should be recorded on HRLocker time management system in accordance with Sage Advocacy of Working Time Act 1997.

# Whistleblowing Policy

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## Purpose

Sage Advocacy is committed to maintaining the highest standards of transparency, honesty and accountability and takes any malpractice by employee, contractors, volunteers or suppliers extremely seriously. While Sage Advocacy's existing management structure and system of internal financial control are the normal mechanisms to detect and draw attention to any irregularities, it may be necessary in certain circumstances to have an alternative reporting line available. In such circumstances the Whistleblowing Policy will apply.

## Policy

Employees who have specific knowledge or serious concerns about perceived material irregularities should inform the CEO immediately. If for any reason, the employee deems it inappropriate to refer the matter to the CEO, the concern should be referred to the Chairperson of the Board.

Serious concerns may include financial malpractice, serious breaches of agreed policies and procedures or significant departures from statutory or other requirements.

Sage Advocacy will provide reasonable support to all employees with genuine, supported, material concerns and will aim to protect them from detriment, provided that at all times the person with the concern has acted in good faith and for the benefit of the organisation. Anonymous allegations will not be entertained under any circumstances.

The CEO or the Chairperson will be responsible for deciding what action should be taken and may request that the matter be investigated internally or externally and if appropriate reported to An Garda Síochana.

The identity of the employee with the concerns may be kept confidential, as appropriate, unless a formal investigation is launched. Thereafter the identity of the employee may not be kept confidential. In addition, the employee may be required to co-operate with investigating authorities and to give evidence to a Court or other forums.

If the matter is investigated, the person(s) who is the subject of the concern will be informed in writing of the concerns, the evidence supporting the concerns and they will be allowed full opportunity to comment before the investigation is concluded. The employee who raised the concern will be informed of the general outcome of the investigation but will not be entitled

to receive a copy of any report. The person(s) who is the subject of the concerns will be entitled to receive a copy of any report if the investigation concludes that the concern was justified.

Sage Advocacy's policies and procedures in relation to grievances, bullying, harassment and disciplinary matters are the appropriate procedures to use where issues affect an individual personally and such matters are therefore outside the scope of this policy.

## **Performance Review Policy**

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### **Purpose and Scope**

The purpose of this policy is to offer employees a performance-based evaluation system that provides for an objective and consistent means of measuring their performance. This policy applies to all permanent employees of Sage Advocacy.

### **Objectives**

- 1) To provide employees with an evaluation of their performance, along with the necessary information to sustain or improve it.
- 2) To provide a basis for determining employee development needs.
- 3) To provide Sage Advocacy with a systematic evaluation of employee performance based on a standardised performance management framework.

### **Evaluation**

The performance of each employee who has successfully passed probation shall be reviewed on an annual basis in a staged process – at mid-year and year end. The review will involve a private meeting with your line manager, which will normally take no more than 60 minutes. You will already have completed a standard form available in the library on SharePoint. This form is designed to establish your own assessment of your performance and achievement of objectives, and to determine your future development needs in terms of learning and personal growth. It will also give you the opportunity to comment on current Sage Advocacy policies and projects and on the operation of Sage Advocacy. The completed form should be submitted to your line manager at least one week prior to the review meeting. He/she will provide you with written feedback at least two working days before the meeting.

This review process and ongoing evaluations should give you a clear picture of where you stand in terms of performance. You will also be given the opportunity to express

disagreement with any points made by the line manager. You will be encouraged to seek and receive guidance in improving performance.

In circumstances where a concern arises about the performance of an employee, it may be necessary to take action under this policy.

Underperformance includes, but is not limited to:

- ongoing failure to meet specified, realistic objectives and standards; and
- unsatisfactory work performance, i.e. a failure to perform the duties of the position.

Line managers are responsible for ensuring employees are aware of the acceptable standards of performance expected from them and for dealing with shortcomings promptly and fairly. In general, the line manager will deal with any concern on an informal basis, first through discussion and appropriate assistance, before dealing with the matter through this Policy.

All employees must comply fully with any underperformance process. An employee who fails to comply with an underperformance process, without reasonable cause, will be in breach of his / her terms of employment and will be subject to disciplinary action.

Where issues of underperformance arise, an informal Performance Review Meeting will be arranged with the employee to address the issues and attempt to resolve them collaboratively. The Performance Review Meeting will take place when efforts to resolve the matters informally have not been successful. The meeting is used to identify the reasons for underperformance and, where appropriate, to determine whether a Performance Improvement Plan (PIP) should be put in place. A PIP is used to assist the employee to improve his or her performance to the required standard, within a specified timeframe. In the Performance Review Meeting the manager will set out the underperformance issues; allow the employee to respond and discuss the question of whether a PIP may be appropriate.

This process is founded on the expectation that the employee will achieve the specified improvements. However, where satisfactory improvement is not achieved, the employee should be aware that the matter will be dealt with under the Disciplinary Procedure.

## **Employee Development Policy**

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### **Purpose and Scope**

Sage Advocacy's employee development policy is designed to encourage employees to pursue additional qualifications and to ensure compliance with any compulsory qualifications

relevant to their work. Sage Advocacy assigns an employee development budget on an annual basis.

## **Eligibility and Categories of Grant**

To be eligible for an education grant, you must be a full-time employee. Applications must be made in writing to Operations & Governance (Asst. CEO). and are considered under one of the following categories:

### **Category One**

If a course is considered to be a compulsory requirement for the employee's current work, Sage Advocacy will arrange a grant covering the full cost of tuition and examination fees.

### **Category Two**

If a course is considered to be directly relevant to the employee's current work, Sage Advocacy will generally arrange a grant covering 50% of the tuition costs, up to a maximum of €2.5k, plus examination fees. On submission of a receipt for the payment of fees, 50% of the grant is paid upfront, with the balance payable on successful completion of the relevant examination(s), subject to evidence of completion. If there are no formal examinations, the balance is paid when it is established that the employee attended at least 90% of the course lectures.

### **Category Three**

Grants are also available for courses which do not directly relate to the employee's current work but enhance broad knowledge. Such courses may attract a grant covering up to 50% of the costs, up to a maximum of €2.5k. When a receipt for the payment of fees is presented, 25% of the course fees are paid. The balance (25%) is payable on successful completion of the course examination(s). If there are no formal examinations, the balance is paid when it is established that the employee attended at least 90% of the course lectures.

For all courses, a payment of 50% of the cost of recommended textbooks is available up to a maximum of €75.

### **Post-dated Grants**

The situation may arise where an employee begins or completes an education course without applying for a grant but later decides to seek one. While not encouraged, such applications are not ruled out. Each application will be considered individually on its merits (not least in

terms of its relevance to the employee's work) at the discretion of the Operations & Governance (Asst. CEO), advised by the Management Team. Appropriate receipts must be submitted with the application.

## **Study Leave**

Depending on the category of course being undertaken, and subject to the employee's prior agreement with their line manager, up to five days paid study leave per academic year may be granted. Paid time off may also be given for examination days. Unpaid study leave, and/or flexible working arrangements to facilitate study, may be granted at Sage Advocacy's discretion in agreement with your manager.

## **Repeat Examinations**

The balance of an education grant is only payable when an employee passes the examination in the subject they are studying. No additional finance or study leave is made available for repeat examinations.

## **Reimbursement of Grant by Employee**

There are a number of circumstances under which education grants made by Sage Advocacy to an employee must be repaid:

- Where the employee leaves Sage Advocacy within 12 months of completing the course of study.
- Where the employee voluntarily gives up the course (a monthly salary deduction can be arranged).
- Where the employee resigns before examination of the subject(s) in respect of which the grant was made, or before the examination results are to hand.
- Where the employee has not achieved the required 90% attendance at the course.

## Remuneration & Reward Policy

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The Sage Advocacy Board of Trustees has developed a remuneration policy to provide guidelines for Sage Advocacy to attract, motivate and retain employees with the skills required to support the delivery of our strategic objectives.

As a medium-sized non-profit, Sage Advocacy understands that its employees are its primary asset and the delivery of its strategic priorities is contingent on a stable workplace with a skilled workforce and so we seek to recruit and retain employees who can represent our interests and the interests of the people that we represent.

Remuneration of all employees is reviewed annually. The CEO, advised by the Financial Controller, will review the remuneration of all employees with the exception of their own and advise the Compliance, Risk & Audit Committee of any recommended adjustments required as part of the annual budget process.

The board of directors has final agreement over each annual Sage Advocacy budget. The Board will review the remuneration levels of the CEO annually and agree and recommended changes, if required.

Sage Advocacy takes a multi-pronged approach to employee-wellbeing and retention including;

- Creating a positive work environment,
- Providing employee development opportunities,
- Ensuring adequate employee supervision and support,
- Reviewing employee remuneration annually as part of the budget setting process to ensure it is adequate to the posts concerned.

Therefore, our approach to recruitment and remuneration will consider and balance;

- The need to set pay levels at the appropriate levels for the competencies, skills, and experience required from our employees.
- Sage Advocacy's ability to pay over the longer term.
- Sage Advocacy's current funding situation.
- The entire 'reward package' on offer to each employee.

## **Sage Advocacy's approach to non-pay benefits**

Sage Advocacy offers employee benefits in addition to basic pay. This includes company days, pension, paid sick leave, flexible working opportunities and access to training courses.

Each employee will receive an annual 'Total Rewards Statement' which outlines the pay and non-pay benefits received by each individual employee annually.

### **Personal Retirement Savings Account (PRSA)**

All employees who have successfully completed their probationary period have the option to join a Personal Retirement Savings Account scheme with Zurich. You will be allowed access to Sage Advocacy's nominated broker, Mercer, to consult in relation to your pension requirements. An employee will contribute 5% of their gross salary matched by a 5% employer contribution. Full details of the scheme, including an explanatory booklet are available from the Operations & Governance (Asst. CEO).



## **Volunteer Policy**

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Sage Advocacy recognises the role volunteers have in the work of the organisation. We value their contributions and aim to attract volunteers who align with our goals. We provide support, supervision, and comply with legislative obligations for our volunteers.

### **Eligibility**

Sage Advocacy welcomes Expressions of Interest from volunteers with specialist skills such as law, finance and case management. Selection criteria based on skills, qualifications, and experience will apply.

### **Selection**

Our selection process may include preparing a role description, setting selection criteria, meeting candidates, conducting interviews, verifying qualifications and references, issuing agreements and completing Garda Vetting.

### **Confidentiality & Data Protection**

Details in relation to what personal data is collected in relation to volunteers or prospective volunteers, and the purposes for which such data may be used are set out in Sage Advocacy's Data Protection & Information Security Programme.

### **Reference Checks**

Sage Advocacy will always request the permission of the volunteer in advance of checking references or qualifications. Reference checks for every candidate are carried out in the same way. It is the policy of Sage Advocacy to seek at least two references.

### **Training and Development**

Sage Advocacy is committed to ensuring that all those working in the organisation are provided with a high standard of relevant training and have appropriate opportunities for learning and skill development.

All Volunteers will undergo induction and training specifically tailored to equip them to carry out the role professionally and effectively.

### **Probationary Period**

Some roles may have a probationary period to ensure both the volunteer and Sage Advocacy is satisfied with the volunteering arrangement. The duration depends on the nature and hours of the role and it will be decided by their line manager on advice by the Management Team.

## **Support and Supervision**

Volunteers have access to support and supervision throughout their volunteering period. Volunteers will be supported in their role by a Regional Advocate or Regional Manager.

Any difficulties will be handled fairly and in line with our grievance and disciplinary procedures.

## **Expenses**

Sage Advocacy has a comprehensive Expense Policy which is available to access in the library on SharePoint at this [LINK](#).

It is Sage Advocacy's policy that no volunteer should be out of pocket for any reasonable expenses incurred while working or travelling for Sage Advocacy. Employees' expenses will be reimbursed in defined circumstances.

## Part 3 - Leaving Sage Advocacy

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### Resignation

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Employees must give the minimum notice stipulated in their contract of employment of their intention to resign from Sage Advocacy's employment. A formal letter of resignation should be sent to your line manager.

### Termination

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Notwithstanding the nature of an employee's contract, in the event of the termination of employment by Sage Advocacy an employee will be entitled to receive notice in accordance with the provisions of the Minimum Notice and Terms of Employment Acts 1973 -2001. Likewise, where an employee intends to resign from employment, they will be required to give notice in writing. Sage Advocacy may, in its discretion pay an employee salary in lieu of notice. Nothing in this contract shall prevent the giving of a lesser period of notice by either party where it is mutually agreed.

Sage Advocacy further reserves the right to require an employee not to attend Sage Advocacy premises during any period of notice, or, alternatively to require an employee to carry out other duties and functions as may be prescribed during this time.

In the event of the termination of employment by reason of serious misconduct on an employee's part, the employee will not be entitled to receive notice in accordance with this clause.

### Exit Interviews

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An exit interview provides Sage Advocacy with an opportunity to obtain honest feedback from an employee who is leaving our employment and all exiting employees are encouraged to participate in an exit interview.

The interview should be conducted by the individual's line manager, unless they request another member of the Sage Advocacy Management Team to carry out the interview.

A standardised exit interview questionnaire is used, a record is kept of the interview and the information provided in the exit interview will be stored securely. While information raised in the exit interview will be shared, as appropriate, in order to take advantage of professional development and organisational learning, the exit interview should not take the place of a complaints or grievance process.

In the case of the CEO resigning his/her role, the Chairperson of the board should agree with the CEO that a member of the Board will conduct an exit interview.

## **Lay-off, Short-Time Working & Redundancy Policy**

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If Sage Advocacy experiences a shortfall of funding, for example due to a sudden or unexpected loss of a funding contract, it may be necessary to lay you off or reduce your working hours or impose temporary or permanent lay-off.

### **Short-Time Working**

Short-time working refers to a specific temporary situation which may arise due to a reduction in available work, for example due to a reduction in funding.

Short-time applies when the hours you work are reduced to less than half of your normal weekly working hours or your weekly pay is less than half your normal weekly pay,

### **Lay-off**

A lay-off is a temporary arrangement which may be required should Sage Advocacy not be able to provide work for an employee, on a temporary basis. This may occur due to a loss of funding. A lay-off involves the suspension of employment of an employee, or a number of employees, on a temporary basis without payment.

### **Notifying Employees About Lay-Offs / Short Time**

In the event that Sage Advocacy will require lay-offs or short-time working it will notify you in writing beforehand. In this notice, Sage Advocacy will explain the reason for the lay-off or short-time and advise when further information will be available.

In the event that lay-offs or short-time working applies, there are social welfare supports available, depending on your situation.

## **Redundancy**

You can claim redundancy if you are on a lay-off or short-time working or a combination of both for either:

- At least 4 consecutive weeks
- 6 weeks within the last 13 weeks

Redundancy generally occurs where you lose your job because the role ceases to exist for reasons unrelated to the person. This may be due to circumstances such as the closure of the business or a reduction in the number of employees, the funding and financial position of Sage Advocacy, lack of work or reorganisation of Sage Advocacy.

Sage Advocacy will provide employees with clear and transparent information about the role(s) affected and will explore redeployment of voluntary redundancies, where this is possible, before any selection process for redundancy is initiated.

The Redundancy Payments Acts 1967–2014 provide a minimum entitlement to a redundancy payment for employees who have a set period of service with the employer. Not all employees are entitled to this statutory redundancy payment, even where a redundancy situation exists.

More information on statutory redundancy can be found at this [LINK](#).

In the event of a redundancy process, Sage Advocacy will communicate all aspects, including the redundancy payment, in writing to all employees.

### **Selection for short time, lay-off and redundancy**

When selecting employees for lay-off or short-time working or redundancy, Sage Advocacy will establish the criteria for selection and apply this fairly.

Sage Advocacy does not operate a “last in, first out policy” and selection criteria will balance the need to retain key skills, experience, knowledge with other business requirements.

Where a voluntary short-time, lay off or redundancy situation arises, Sage Advocacy reserves the right to refuse an application.

Sage Advocacy will not discriminate in the selection of employees for short-time, lay-off or redundancy.

## Retirement

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Sage Advocacy recognises the valuable contribution made by employees of all ages. The current qualifying age for all State pensions is 66. Sage Advocacy do not recognise a compulsory retirement age and understands that some employees would like to work beyond the qualifying State pension age. Your line manager will be happy to facilitate a conversation in relation to retirement or longer working.

Fitness to work matters will not be considered in relation to the age of any employee and are dealt with in the illness section.

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Available on HRLocker

**For further information please  
contact:**

Operations & Governance (Asst. CEO)  
24-26 Ormond Quay Upper  
Dublin 7  
D07 DAV9

01 536 7330  
info@sageadvocacy.ie  
@SageAdvocacy  
Sage Advocacy

CRO # 610824  
RCN # 20162221  
CHY # 22308

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