



Date Created: 25-05-2023



Australian Government



**Workplace
Gender Equality
Agency**





Date Created: 25-05-2023

2022 - 23 Gender Equality Reporting

Submitted By:

Summerland Financial Services Limited 23087650806

#Workplace Overview

Policies and Strategies

- 1. Do you have a formal policy and/or formal strategy in place that specifically supports gender equality in the following areas?**

Recruitment: Yes
Policy

Retention: Yes
Strategy

Performance management processes: Yes
Policy; Strategy

Promotions: Yes.
Strategy

Talent identification/identification of high potentials: Yes
Strategy

Succession planning: Yes
Strategy

Training and development: Yes
Policy

Key performance indicators for managers relating to gender equality: No
- 2. Do you have a formal policy and/or formal strategy in place that supports gender equality overall?**
Yes
Policy
- 4. If your organisation would like to provide additional information relating to your gender equality policies and strategies, please do so below.**

Governing Bodies

Organisation: Summerland Financial Services Limited

1.Name of the governing body: Board of Directors

2.Type of the governing body: Board of Directors

Number of governing body chair and member by gender:

Chair	Female (F) 0	Male (M) 1	Non-Binary 0
Member	Female (F) 2	Male (M) 3	Non-Binary 0

4.Formal section policy and/or strategy: Yes

Selected value: Strategy

6. Target set to increase the representation of women: Yes

6.1 Percentage (%) of target: 50

6.2 Year of target to be reached: 2026-12-31

7. Do you have a formal policy and/or formal strategy in place to support gender equality in the composition of this organisation's governing body?

Yes

Selected value: Strategy

2. If your organisation would like to provide additional information relating to your gender equality policies and strategies, please do so below.

#Action on gender equality

Gender Pay Gaps

1. Do you have a formal policy and/or formal strategy on remuneration generally?

Yes

Strategy

1.1 Are specific pay equality objectives included in your formal policy and/or formal strategy?

No Salaries set by awards/industrial or workplace agreements; Non-award employees paid market rate

2. What was the snapshot date used for your Workplace Profile?

2023-03-24

4. If your organisation would like to provide additional information relating to gender pay gaps in your workplace, please do so below.

Employer action on pay equality

1. Have you analysed your payroll to determine if there are any remuneration gaps between women and men (e.g. conducted a gender pay gap analysis)?

Yes

1.1 When was the most recent gender remuneration gap analysis undertaken?

Within the last 1-2 years

1.2 Did you take any actions as a result of your gender remuneration gap analysis?

No

No unexplained or unjustifiable gaps identified

1.3 What type of gender remuneration gap analysis has been undertaken?

- 3. If your organisation would like to provide additional information relating to employer action on pay equity in your workplace, please do so below.**

Employee Consultation

- 1. Have you consulted with employees on issues concerning gender equality in your workplace during the reporting period?**

Yes

1.1 How did you consult employees?

Other

Other: Part of Induction and annual refresher e-learning

1.2 Who did you consult?

ALL staff

- 2. Do you have a formal policy and/or formal strategy in place on consulting employees about gender equality?**

Yes

Strategy

- 3. On what date did your organisation share your last year's public reports with employees and shareholders?**

Employees:

Shareholder:

- 4. Have you shared previous Executive Summary and IndustryBenchmark reports with the governing body?**

Yes

5. If your organisation would like to provide additional information relating to employee consultation on gender equality in your workplace, please do so below.

#Flexible Work

Flexible Working

1. Do you have a formal policy and/or formal strategy on flexible working arrangements?

Yes

Policy

- 1.1. Please indicate which of the following are included in your flexible working arrangements strategy or policy:

A business case for flexibility has been established and endorsed at the leadership level

Yes

The organisation's approach to flexibility is integrated into client conversations

Yes

Employees are surveyed on whether they have sufficient flexibility

Yes

Employee training is provided throughout the organisation

Yes

The impact of flexibility is evaluated (e.g. reduced absenteeism, increased employee engagement)

Yes

Flexible working is promoted throughout the organisation

Yes

Date Created: 25-05-2023

Targets have been set for engagement in flexible work

No

Metrics on the use of, and/or the impact of, flexibility measures are reported to the governing body

Yes

Metrics on the use of, and/or the impact of, flexibility measures are reported to key management personnel

Yes

Leaders are held accountable for improving workplace flexibility

Yes

Leaders are visible role models of flexible working

Yes

Manager training on flexible working is provided throughout the organisation

Yes

Targets have been set for men's engagement in flexible work

No

Not aware of the need

Team-based training is provided throughout the organisation

Yes

Other: Yes

Provide Details: Manager training and message cascaded in team training

2. Do you offer any of the following flexible working options to MANAGERS in your workplace?

Carer's leave: Yes

SAME options for women and men Formal options are available

Compressed working weeks: Yes

SAME options for women and men Formal options are available

Flexible hours of work: Yes

SAME options for women and men Formal options are available; Informal options are available

Job sharing: Yes

SAME options for women and men

Formal options are available

Part-time work: Yes

SAME options for women and men Formal options are available

Purchased leave: Yes

SAME options for women and men Formal options are available

Remote working/working from home: Yes

SAME options for women and men

Time-in-lieu: Yes

SAME options for women and men

Formal options are available

Unpaid leave: Yes

SAME options for women and men Formal options are available; Informal options are available

3. Are your flexible working arrangement options for NON-MANAGERS the same as the options for managers above?

Yes

5. Did you see an increase, overall, in the approval of FORMAL flexible working arrangements for your workforce between the 2021-22 and the 2022-23 reporting periods?

Yes, women and men

7. If your organisation would like to provide additional information relating to flexible working and gender equality in your workplace, please do so below.

#Employee Support

Paid Parental leave

1. Do you provide employer-funded paid parental leave in addition to any government-funded parental leave scheme?

Yes, we offer employer funded parental leave using the primary/secondary carer definition

1. If your organisation would like to provide additional information relating to paid parental leave and gender equality in your workplace, please do so below.

1.1/1.2 g = 12 months

Support for carers

1. Do you have a formal policy and/or formal strategy to support employees with family or caring responsibilities?

Yes

Policy

2. Do you offer any of the following support mechanisms for employees with family or caring responsibilities?

- 2.1. Employer subsidised childcare

No

Not a priority

- 2.2. Return to work bonus (only select if this bonus is not the balance of paid parental leave)

No

Not a priority

- 2.3. Breastfeeding facilities

Yes

Available at SOME worksites

- 2.4. Childcare referral services

No

Not a priority

- 2.5. Coaching for employees on returning to work from parental leave

Yes

Available at ALL worksites

- 2.6. Targeted communication mechanisms (e.g. intranet/forums)

No

Not a priority

- 2.7. Internal support networks for parents

No

Not a priority

- 2.8. Information packs for new parents and/or those with elder care responsibilities

No

Not a priority

- 2.9. Parenting workshops targeting fathers

No

Not a priority

2.10. Parenting workshops targeting mothers

No

Not a priority

2.11. Referral services to support employees with family and/or caring responsibilities

No

Not a priority

2.12. Support in securing school holiday care

No

Not a priority

2.13. On-site childcare

No

Not a priority

2.14. Other details: No

3. If your organisation would like to provide additional information relating to support for carers in your workplace, please do so below.

Sexual harassment, harassment on the grounds of sex or discrimination

1. Do you have a formal policy and/or formal strategy on the prevention and response to sexual harassment, harassment on the grounds of sex or discrimination?

Yes

Policy; Strategy

- 1.3 Do you provide a grievance process in your sexual harassment policy and/or strategy?

Yes

2. Do you provide training on the prevention of sexual harassment, harassment on the ground of sex or discrimination to the following groups?

All Non-Managers

Yes

Voluntary question: All Non-Managers

9. If your organisation would like to provide additional information relating to measures to prevent and response to sexual harassment, harassment on the grounds of sex or discrimination, please do so below.

Family or domestic violence

1. Do you have a formal policy and/or formal strategy to support employees who are experiencing family or domestic violence?

Yes

Strategy

2. Other than a formal policy and/or formal strategy, do you have the following support mechanisms in place to support employees who are experiencing family or domestic violence?

A domestic violence clause is in an enterprise agreement or workplace agreement

Yes

Confidentiality of matters disclosed

Yes

Protection from any adverse action or discrimination based on the disclosure of domestic violence

Yes

Employee assistance program (including access to psychologist, chaplain or counsellor)

Yes

Emergency accommodation assistance

No

Provision of financial support (e.g. advance bonus payment or advanced pay)

No

Flexible working arrangements

Yes

Offer change of office location

Yes

Access to medical services (e.g. doctor or nurse)

No

Insufficient resources/expertise

Training of key personnel

Yes

Referral of employees to appropriate domestic violence support services for expert advice

Yes

Workplace safety planning

Yes

Access to paid domestic violence leave (contained in an enterprise/workplace agreement)

Yes

Is the leave period unlimited?

No

Number of Days:

10

Access to paid domestic violence leave (not contained in an enterprise/workplace agreement)

No

Other

Other Details: Under Award

Access to unpaid domestic violence leave (contained in an enterprise/workplace agreement)

No

Other

Provide Details: Replaced with paid DV leave

Access to unpaid leave

Yes

Is the leave period unlimited?

No

Number of days:

10

Provide Details: Yes

Special leave and unpaid leave approved by executive on a case by case basis

- 2. If your organisation would like to provide additional information relating to family and domestic violence affecting your workplace, please do so below**