


Organisational Change Policy – Guidance for completion of Templates

The Recruitment and HR departments have drafted a suite of templates that you can access and use to support you when managing change.

General Guidance

When using the templates you will need to ensure;

1. The Templates are listed on People First for you to access and are named and numbered to help you find the right one using the Guidance below. Click on the template you wish to use, to open the template. **You should immediately save this to your G/drive or personal drive.** This should be done each and every time to ensure you are using the latest version.
2. It is an assumption that any letters will be attached to an e mail for the employee. Should you need to print and post a letter, use letter headed paper or insert the letter head details in the template letter when printing
3. Details in **bold** and *italics* or within a [] – you need to insert some specific details e.g. **[Date]** would mean that you need to insert the relevant date.
4. Anything that is highlighted means that you need to either chose one sentence/paragraph or another and then delete the highlighted text e.g. (*Delete as appropriate) means you need to decide which of the following sentences or paragraphs is the relevant one to use, the sections to consider will be pre-fixed with a '*'. Once you have chosen the relevant paragraphs delete other paragraphs that aren't relevant and ensure you take off the highlight colour from any words/sentences highlighted, to do this select the word or section highlighted then click on the icon: 
5. You put your employee's full name (Forename and Surname) in the address details.
6. Once you have added in the relevant details and removed any sentences/paragraphs as appropriate, you should ensure that all the text is changed to normal text so take off any '**Bold**' or '*Italics*' e.g. any dates you have inserted should be made normal text so rather than '**10 September 2021**' you should make it '10 September 2021'.

7. When organising dates and times for meetings you should discuss and agree these with your employee prior to confirming in writing. This will ensure that you are both free to attend on the date agreed and avoid any unnecessary delay in the process.

[Which template should I use for which meeting or situation?](#)

Each template is numbered and a description provided to make it easier for you to identify the correct one to use. You **must** ensure you use the **correct template** therefore if you are unsure of which one to use please refer to the details below;

<u>Template no.</u>	<u>Template Name</u>	<u>When to use the template</u>
CH1	Change Programme Proposal Document	When you are thinking about change and how you want to present this to your team and to Staff Side during a Consultation process, use CH1 to structure your proposals. This document must be developed with support from the HR Lead and must be discussed with the appropriate staff side forums, before any communication with your teams.
CH2	Invitation to Consultation launch	If you decide to have a presentation to your team about proposals for change, when arranging this, you should use the suggested wording in CH2 for your e mail/calendar invite to send to your team members.
CH3	Launch Attendance Sheet	Use CH3 to list your team members and capture those present at the presentation, any who are absent and any alternative contact details etc. Send this to HRDirect on completion.
CH4	Cover e mail to signpost to Consultation documents	When you are ready to advise your team of the proposals, for example after a presentation, you should use the suggested wording in CH4 for your e mail to send to your team members. Use this to signpost each individual team member to the Consultation document.
CH5	Agenda for Collective Consultation meetings	In order to provide structure to a Collective Consultation meeting, we recommend that you have an agenda. Use CH5 when setting out your agenda for the meeting.
CH6	Minutes of Collective Consultation meetings	During each Collective Consultation meeting, you must ensure there is a nominated person to take minutes and/or to note the key discussion points and actions. Use CH6 to take minutes. Ensure that the minutes have been agreed between management and Staff Side. This must be provided to the HR Lead for updating the available

		Consultation documents to our employees.
CH7	Joint Communiqué	At the end of each Collective Consultation meeting, a brief summary of the outputs from the meeting will be agreed between management and Staff Side representatives. This must be summarised using CH7 and provided to the HR Lead for updating the available Consultation documents.
CH8	Final Decisions Document	At the end of the Collective Consultation process, you need to ensure that you are able to explain what has been agreed with Staff Side. Use CH8 as a guide. This must be agreed between management and Staff Side before the document can be published.
CH9	Invitation to Final Decisions Presentation	Should you decide to have a presentation to your team about final decisions from the Collective Consultation regarding proposals for change, when arranging this, you should use the suggested wording in CH9 for your e mail/calendar invite to send to your team members. NB. This may not always be necessary and will be dependant on the change programme.
CH10	E mail template – Signposting to Final Decisions document	Once the Final Decisions document is available you should use the suggested wording in CH10 for your e mail to signpost each individual team member to the consultation documents.
CH11	Individual Outcome/Impact Letter	Following the publication of the Final Decisions Document, you will need to write to each individual to explain how they are impacted by the change. CH11 will also advise them of the next steps including Individual Consultation. We strongly recommend that you attach this letter, if applicable, to a calendar invitation for individual consultation meetings. (See text in the template). See CH13 for suggested wording.
CH12	Cover letter for redundancy estimate	At the appropriate time, when there is a redundancy estimate available for the employee following a request by the organisation, a cover letter will be supplied to the HR Lead with the redundancy estimate. You must always use the template provided.
CH13	Email Template - Invite to First Individual Consultation	When arranging to meet the employee, you should use the suggested wording in CH13 for your e mail/calendar to invite them to the first meeting. Any subsequent meetings will be mutually agreed,

		and therefore a calendar invitation will apply.
CH14	First Individual Consultation Meeting Agenda and Notes	<p>For individual consultations, use CH14 to ensure that you are telling the employee what you need to capture the detail of your discussions, including any questions they may have.</p> <p>Should the employee not wish to participate in a meeting for example, if there may be no or minimal impact that is acceptable to the employee, have the discussion, and record on this template.</p> <p>Where Pay Protection applies, the HR Lead should request the ESR-FRM-111 from HR Change Admin.</p>
CH15	Additional Individual Consultation Meeting Agenda and Notes	An employee can request up to 3 meetings, and in some exceptional circumstances may need an additional meeting. Therefore, CH15 allows you to hold and record subsequent meetings.
CH16	SAE assessment	A manager and HR Consult will use the criteria in CH16 when assessing vacancies as suitable alternative employment.
CH17	Notification of Suitable Alternative Employment	Should a role be identified as a Suitable Alternative Employment for an employee, you must use CH17 to advise them. This will also contain details of the appeal process.
CH18	Bespoke Preference/Scoping Questionnaire	<p>Sometimes we need to gather information from the effected employees, such as their preferences for alternative roles, shifts, location, training requirements etc.</p> <p>CH18 can be used to gather their choices. This will need to be requested from HRDirect for the specific Change programme.</p>
CH19	Application for Voluntary Compulsory Redundancy (VCR) or Voluntary Transfer of Redundancy (VTR)	<p>During the collective process if VCR/VTR is confirmed as an option, eligible employees will be sent a link to complete an online questionnaire. The HR Lead should liaise with HR Change Admin to set this up.</p> <p>The Business and HR Leads need to ensure that HRDirect are informed when this process has been opened and when it is due to close, so that arrangements can be agreed.</p>
CH20	Acknowledgement of VCR/VTR Application	On receipt of the VCR/VTR application use CH20 to e mail the applicant confirmation and next steps in the process.
CH21	Agenda for VCR/VTR Panel	HRDirect will provide the Business Lead with an Information Pack including the agenda CH21 , for the panel members to use in the decision making

		process.
CH22	Outcome from VCR/VTR or SAE Panel	The Chair of the panel needs to use CH22 to send the outcome to the employees following the panel. This will also include details of the appeal process.
CH 23	Appeal Outcome	The Chair of the appeal panel needs to use CH23 to send the outcome to the employee following an SAE/VCR/VTR appeal.
CH 24	Invite to Final Consultation meeting to contemplate dismissal due to Redundancy	As the Dismissing manager, you will need to ensure that the employee is formally invited using CH24 to a meeting. The letter will contain details of location and representation etc. NB. You will need to ensure this is planned to take in to consideration giving the required notice of termination.
CH 25	Final Consultation to contemplate formal notice of redundancy Agenda and Notes	As the Dismissing manager, CH25 will provide you with all of the information you need to provide to the employee and any you may need to gather on behalf of NHSBT. NB: You must take the 'Redundancy Confirmation Form' (see CH26) with you to this meeting
CH 27	Outcome of dismissal meeting due to Compulsory Redundancy	As the Dismissing manager, use CH27 to confirm the dismissal due to Compulsory Redundancy in writing. NB: this must be provided within 7 calendar days of the dismissal meeting.
CH28	Outcome of dismissal meeting due to Voluntary Compulsory Redundancy	As the Dismissing manager, use CH28 to confirm the dismissal due to Voluntary Compulsory Redundancy in writing. NB: this must be provided within 7 calendar days of the dismissal meeting.
CH 29	Confirmation of new appointment	If during the course of a change programme, an employee is slotted in to a new job role, use CH29 to confirm the new arrangements.