



# UNITE THE UNION @ WORK IN HSBC

## THE MERGER REDEPLOYMENT ISSUES

May 1st 2007 was an historical day in the trade union movement in this country, the decision by Amicus and T&G members who voted overwhelmingly in favour, to form the biggest trade union in the country with over 2 million members. It has been decided by both unions that the name of the new union will be Unite. There will be a transitional period over the next 4 years, where we will have two Joint General Secretaries, Derek Simpson will continue to look after the Amicus side of the union and Tony Woodley will continue to look after the T&G side of the union. A new General Secretary will be elected in January 2012. A new National Executive Committee will take office in May 2008

Over the past few months there has been real concern about the way in which staff have been treated in respect of potential closures of a number of site/departments across the bank. The total lack of communication with our members/employees affected, was totally unacceptable. Unite has made a number of approaches to the bank in relation to the staff being left in limbo, by the proposals being changed six months after the announcement had been made. This happened in Card Services in Hamilton when 100 jobs earmarked to be moved to Birmingham were stopped in April of this year. Unite welcomes this decision to retain the jobs in Scotland. However, no consideration had been given to the staff who have either moved out of this department or even left the bank, this is totally not the best practice, it just puts staff in even more uncertainty within the organisation.

John Nolan, Unite National Secretary HSBC said that this process just leaves our members in total uncertainty by the lack of communication which is something that is unacceptable, Unite has now sought assurances from the bank and as a result of this a review of the total communication process is currently taking place.

Birmingham SPC is still scheduled to close on the 31 July 2007, this is another area where our members have been treated with a complete lack of respect, there has been a total breakdown in communication and again this is not an acceptable way forward to improve our industrial relations within the company. In Birmingham we are currently

going through the process of trying to redeploy as many staff as possible into suitable alternative roles, if at the end of this formal process, suitable alternative employment has not been found for any staff affected then you will be made redundant.

However, if you wish to extend your employment until a suitable alternative role is found for you, then this can be done in conjunction with your line manager and your redeployment manager, who will make the necessary arrangements for you to remain in employment with the bank until a suitable role has been established. There has been a lot of confusion and misinterpretation in relation to people having the right to be made redundant. We have to make it clear that no member of staff has the right to be made redundant unless the employer serves formal notice and no suitable alternative employment can be found. At the end of this formal notice process, you will then be able to exercise your right to be made redundant. However, Unite will work the company to ensure that no one is made compulsorily redundant as a result of any redeployment changes that may take place in the company and we will always make it clear to the company and to our members that we will do everything in our power to ensure that people will be redeployed into suitable alternative roles, that may not always be the case, however we will work with the company to ensure this happens and no one is forcibly removed out of a job.



## IN PRAISE OF THE LOCAL BANK BRANCH

Press comment over the last few months has not been kind to HSBC in relation to the branch network. Local campaigning around branch closures scheduled for the first quarter of this year was only compounded by the recent furore over Premier-only branches which centred on Canford Cliffs in Dorset. But is this a fair impression to give of a bank which is investing the best part of half a billion pounds in its branch network and has won the accolade of Sustainable Bank of the Year?

Unite's priority in all this is the impact on staff affected. The last few years have not seen redundancies as a result of branch closures, despite the 33 closures in 2006. Our knowledge so far of the position for 2007 (up to Q3) suggests fewer closures on the cards and even a reversal of four closures planned for Q2. Nevertheless, closures have been and remain a major concern for the union.

This concern relates partly to the fact that smaller branches – with three or fewer staff – which are operating on reduced opening hours, have little opportunity to prove their value in terms of key measures like product sales or new account opening. At the same time, there appears to be no commitment to promoting use of smaller branches either before opening hours are reduced or after. The net result of this disinvestment is that footfall reduces (this is a critical measure in the decision to proceed with closure) and opportunities to “grow the business” are inevitably reduced.



Nevertheless, to the staff and customers who use the smaller branches, their value is immeasurable in a social, economic and environmental sense. The bank states that customers whose branch has closed make greater use of e-channels. Yet this must be less likely for older customers. Gordon Lishman, Director General of Age Concern stated recently – “Older people are an increasing demographic in this country and banks should bear this in mind in how they cater for their customers. Face to face service is very important for many older people. Telephone banking services are unsuitable for those with hearing problems and since internet use declines with age, internet banking can be inappropriate for some older customers. There is also a security issue as many older people feel vulnerable withdrawing money from a cash machine in the street and prefer to go into a bank branch.”

This debate gets to the heart of the bank's image of itself. On the one hand HSBC wants to be seen as socially responsible and environmentally ahead of the pack, but on the other it wants to be able to segment its customers and focus investment on those who have a propensity to buy new products. Likewise, the bank believes that it is serious about assimilating the concept of treating customers fairly and translates service into “keeping it (the product) sold”. Yet at the same time it says (though it may regret this now), in response to the press questioning re the Premier branch issue, “Not everyone in the world is equal”.

Unite members know that fairness to customers is as much (or maybe more?) about providing a service to valued customers who have been loyal to the bank for years in the form they choose, as it is about selling new products to them. This means it is about providing a counter service within a reasonable distance of where they live and carry out their day to day activities. This applies as much to small businesses as it does to customers with limited mobility.

Our members in local branches value the service they provide. They are part of the community they serve (and which provides the bank with income) and they feel a sense of mutual responsibility for the well-being of their neighbours. They do not want to see older or less mobile people having to travel longer distances or rely on others to access financial services because their local branch has closed. Is this not the essence of genuine corporate social responsibility and employee “engagement” with their working lives?

Would you like to comment on the value of your local branch or any of the other issues raised here?

**You can do so by emailing the union – [hsbc@amicustheunion.org](mailto:hsbc@amicustheunion.org)**

## HAVE YOU BEEN PROMOTED?

Unite is investing considerable time and resources into developing our membership and profile amongst managers in HSBC. Part of that process is a new booklet which has been produced by our managers' committee and gives vital information on managers' rights and the benefits of membership.

We are conscious that there are many wrong perceptions in the bank about the role of the union in relation to managers, including that they cannot join. This is wrong. In fact, a disproportionate amount of the casework we cover is for managers who have the same rights to individual representation as clerical staff.

Likewise, Unite plays a pivotal role on the National Council of Managers which is consulted by the bank on a range of issues. The agreement which set up the council is with the union and we nominate five attendees directly to the council. Other council members are also activists in the union and some are members of our managers' committee.

Ultimately, just as is the case for clerical staff, the stronger our membership is amongst managers, the better. Winning back full recognition for the union on behalf of managers in grades M93 to M95 (and salesforce equivalent grades) remains a fundamental aim of Unite in HSBC.

One vital way in which you can contribute to strengthening the union for managers is to let us know if you have been promoted from a clerical grade. This is a key element of our being able to maintain accurate records. You are the only source of this new information, (or any other changes of membership data).

**To update your records, please go to the My Amicus section of our website [www.amicustheunion.org](http://www.amicustheunion.org).**

**(If you would like a copy or copies of our managers' booklet, please ask your JAOR or ring our helpline on 020 7253 9642.)**

## AGE – WHAT'S HAPPENING NOW?

There are now a total of well over 150 members who have objected to the new redundancy terms imposed by the bank at the end of last year. The union is currently working with the bank with the aim of grouping the objectors so that we can conduct a series of collective grievances. The groups are principally based on criteria relating to age, length of service and membership of the defined benefits pension scheme.

Assuming we are able to reach final agreement on these groupings, individual objectors will be written to by the union asking if they are content to be part of the collective grievances and to do a sense check on whether they are in the correct group.

If you are an objector, please ensure that you have given your copy letters to your rep and completed the detailed questionnaires that were sent out by the union either directly to you or via Unite JAORs. If you are unclear what detail is required, please check it out by talking to your JAOR or calling our helpline on 020 7253 9642.

## UNITE EQUALITY CHARTER – WHAT'S THE BIG DEAL?



HSBC, with its exemplary record on equalities policies, is reluctant to talk about them with the union representing its staff. In the run up to International Women's Day, which both Unite and the bank were sponsoring, the union once again urged the bank to sign up to its equal pay charter. Instead the bank decided to say “no” despite the fact that First Direct had signed up months before.

The charter focuses on establishing a joint working group between the union and the employer to improve women's opportunities as a critical step in bridging the pay gap. It also calls for involvement of the union in equal pay auditing and the formulation of an action plan to address any issues found.

For a company which has engaged with the union in conducting equal pay audits for many years and is willing to engage in constructive dialogue with Unite, what is the big deal about the charter?

Speaking to a workshop of the union's HSBC JAORs and in the presence of bank representatives, Unite National Officer for the finance sector Dave Fleming restated our commitment to the charter and said that he did not understand how any initiative to do with equality could be seen as a threat by a bank like HSBC.

The union calls upon the bank once again to reconsider its response to the charter and embark on the progressive dialogue with Unite on this critical issue that our members deserve.

## DO YOU HAVE A WISH/NEED TO CHANGE YOUR PATTERN OR HOURS OF WORK?

Government legislation entitles all those with children under 6 or disabled children under 18 as well as carers for adults the right to apply for flexible working. Employers have to seriously consider the request and can only refuse under set criteria. HSBC have extended the qualifiers and allow ALL staff to make such a request...but this is just that ...a right to REQUEST. The criteria for refusal are very loose and do allow employers an 'out' though a refusal may be subject to challenge under sex discrimination legislation.

HSBC have made a commitment to the flexible working approach and wish this to become an integral part of their business. We at Unite welcome this commitment but our feed-back indicates lots of requests are failing at the first hurdle. Staff looking for flexibility are making their requests orally to line managers who are rejecting them at this point and members believe the matter is finished.

However, we have an agreed approach with the bank to such requests and urge you to follow it. So, if you wish to request a change to your working pattern or hours of work please go to HR procedures on the intranet and follow the instructions. This does involve submitting a formal written request even if you have had verbal discussion with your line manager.

The agreed approach allows MI (management information) to be collated on the need for flexible working for staff and flags all rejections to HR Connect.

Having made a formal request, you then have the opportunity to appeal against any negative decision. As a Unite member you would be fully supported throughout any such procedure.

### For a greater chance of success....put your request in writing!

In addition, why not view and use the JOBSHARE register? This can either be found on the intranet - My Next Move - or on a direct webpage [www.myjobshare.hsbc.co.uk](http://www.myjobshare.hsbc.co.uk). You might find just what you are looking for!



## UNITE EQUALITIES' STARS SHINE IN FIRST DIRECT

Apart from having the courage to sign up to the Unite equality charter, First Direct has produced a team of winners in the Unite Equalities Award.

### As Amicus the activist reported...

To celebrate the union's historic commitment to equalities and to help us build still further on our achievements last spring we launched the Amicus Equalities Award to showcase the great work reps do fighting for fairness at work. Here you can read about the FDORS as examples of our top reps' equality achievements. They will receive a gold badge and a video will be made of them and shown at this year's Unite Amicus section policy conference.

### Unite at First Direct

Unite First Direct team reps have made considerable progress in raising awareness of the issues surrounding inequalities both in the workplace and the wider community.

Regular monthly meetings have been established between human resources and union reps where issues surrounding equalities are raised in the workplace. A positive outcome from this was the creation of "diversity champions," who target all surrounding diversity issues in the office. A new prayer room set aside for the use of all faiths has also been set up.

Disability awareness is constantly addressed on site – all areas are accessible to all employees and through union involvement they have had automatic doors installed in some areas, and regular visits ensure disability access does not become a problem.

"We have a good working relationship on site and we are dedicated to dealing with issues and diversity," explained Unite rep Chris Hargrave.

"Union representation is present on all role evaluations at every stage and we are currently working so that all jobs will be made available on a part time or full time basis, ensuring career progression is available to all.

"Further to this when recruiting we run focus and diversity workshops including everyone from young mums, to over 45s, to those with a disability. In such a way we can focus on how to recruit members from all areas."

### And some sterling work goes on in Hemel. Local JAOR Dawn Green reports – Why is Term Time Important?

Term time is important in the work place as it allows working parents who for whatever reasons have care issues to carry on working without the added stress of child care.

I have a child who is developmentally delayed and when she was six was informed that she was too old

for her present child care. I was unable to find alternative care as my child soiled herself and was faced with the possibility of giving up work just because of no holiday cover.

I discussed this with a team leader at work who told me the bank had recently introduced T/T contracts. I applied and was successful.

However, since becoming a union rep I have become aware that I was lucky to apply and get T/T. Others have not been so fortunate and have had to fight for their rights.

At Hemel, we have the highest no of T/T staff across all the DSC sites. In fact, with all the sites added together, we still have a higher ratio. This is because the Unite reps at Hemel have actively campaigned with management to increase the level of T/T.

The most up-to-date details I have show -

- Swansea 1
- Leeds 4
- Southampton 7
- Edinburgh 1
- Hemel 14

We have now created a T/T team and, since we had a point to prove, set out to win competitions and smash targets. We have been top team at Hemel. As we were able to demonstrate that T/T works, I have managed to get the management to give three more people T/T contracts and am at present working to get management to agree a new T/T team.

I believe that, by highlighting the success at Hemel, it could be possible to change the view generally held that T/T is more trouble than it's worth.

Congratulations to the FDORS on their gold badge for equality and to Dawn and the reps at Hemel for their pioneering work on Term Time working.

## NOT HAPPY WITH SOMETHING AT WORK? "TURN IT INTO A UNITE CAMPAIGN" SAYS SECONDED REP CHRIS HARGRAVE

There are lots of issues that we as trade unionists could campaign about. Choosing the right campaign for your workplace is not simply a case of sitting down and thinking of one. A successful campaign has to be well organised, have purpose and, above all, be relevant to our members. A successful campaign will also help to increase Unite's profile and recruit new members.

So, how do we go about finding out what's relevant? Communication is crucial. Talking to our members and canvassing their views is the key to a successful campaign. There are various methods of finding out what the membership wants, surveys, surgeries, and, of course, just talking to them.

I can give an example of a successful campaign that the team of reps at first direct (FDORS) were involved in recently. When preparing for upcoming pay negotiations, we approached our membership in various ways. All the reps are well known within the business and all made the time to discuss the pay negotiations with members. We distributed (and collected!) a pay survey to all members, we also took the opportunity to explain the pay survey to non-members in the hope of recruiting them to the union.

As well as the survey we held a road-show type event which gave people the opportunity to approach us and us them. From listening to members and collating the responses on the survey we were able to identify the key issues affecting our members.

The issues of unpaid overtime for role level 6 & 7 (middle managers) and working arrangements (including payments) for overnight staff were raised by a number of members during the campaign, and were used to form part of our pay claim. This was negotiated through our joint negotiation and consultation forum with First Direct, the FD Council.

Because we were confident that these were issues close to our members' hearts, we were able to negotiate with management from a position of strength. As a result we successfully negotiated full paid overtime for all level 6 grades. In addition, staff on nights now have the option to go onto a rotational shift pattern. This was exactly what they wanted because it means they no longer get stuck working every Friday, Saturday night, etc. In addition, if they do take-up the rotational shift option, they will receive an extra £2300 on their pay. This is the first time the union has been able to achieve special payments for night workers in First Direct.

### The key to the success of this campaign was:

- By communicating with members and potential members we found out what issues were relevant.
- By campaigning on relevant issues we can be pro-active and produce results.
- By producing results and advertising our success, we raise the profile of the union.
- By raising the profile of the union we can increase membership.
- With increased membership more issues become relevant and come to the fore.
- The members win, the union wins and the bank wins by getting real issues resolved.
- And so the positive cycle continues.

So, if you are a union rep or activist, try to seek out the issues that concern members in your workplace and work with us to make them into campaigns. If you are a member or potential member, get in touch with your local rep about the things that concern you and ask them to help build a campaign. If you are not sure how to go about this, call our helpline on 0207 253 9642.

# PAY SURVEY 2007

2007 is proving to be a year of growing inflation, despite predictions that the high levels at the start of the year would be short lived. At HSBC, despite a review of the three year pay deal prior to the April review, the pay pot of 3% for both managers and clerical staff remains significantly below inflation and our major comparators in the banks. Amidst the discontent this is causing to Unite members, the bank has stated that it will be reviewing pay and reward in the light of the treating customers fairly agenda as well as promising to introduce a flexible benefits package.

As part of our preparation both to take part in the review of pay and benefits in HSBC and to prepare the union's position on pay for the coming year, we are asking our members to respond to ten key questions. These are set out below. You can get spare copies from your JAOR or by calling or mailing our helpline on 020 7253 9642.



## HOW ENGAGED ARE YOU?

Employee engagement is a critical issue for the bank and one which has frequently been discussed with the union over the last few months. Increasing engagement scores have been used, for example, to counter our arguments about staff discontent in relation to pay negotiations and we have raised our concerns about the impact of the surveys themselves on staff and managers.

Unite has questioned whether it is fair or appropriate for managers' performance to be judged on the basis of their staff's opinions on "management" as a whole. Some members report that their loyalty to their line manager means they are reluctant to be too negative. Others feel they are being cajoled by their manager into being more positive than they would naturally be.

The bank has suggested that, whilst it maintains that line managers are responsible for delivering messages from the top in a positive way, they recognise that some logical dividing line needs to be drawn so that managers are not punished for decisions they have no influence over.

We await sight of and debate over the new global survey to take place in September to see how they plan to achieve this.

In the meantime we thought it appropriate to do our own short survey of engagement amongst our members in HSBC.

The questions below have been chosen by the union from the bank's engagement survey but will be collated simply on the basis of the percentage of respondents choosing each option for each question.

ENGAGEMENT SURVEY					
	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
My workload allows me to maintain a good balance between work and life					
I am encouraged to do what's right for the customer					
There are career opportunities available to me at HSBC					
My Total Reward package is fair compensation for the work I do					
Our leaders act on employee feedback					
The business operates ethically					
I am motivated by the changes within HSBC					
I trust the information I receive from HSBC					
HSBC values diversity					
I am aware of HSBC's Corporate Social responsibility activities					

1) I received an inflation or above pay rise in 2007. Yes  No

2) I received an inflation or above pay rise in 2006. Yes  No

3) I received an inflation or above pay rise in 2005. Yes  No

4) I believe I receive a comparable rate of pay to others doing a similar job in other major banks/companies.

Strongly agree  Agree  Neither agree nor disagree

Disagree  Strongly disagree

5) The pay system in HSBC is fair.

Strongly agree  Agree  Neither agree nor disagree

Disagree  Strongly disagree

6) The quarterly bonus scheme motivates me to improve my productivity.

Strongly agree  Agree  Neither agree nor disagree

Disagree  Strongly disagree

Please send your responses to Unite HSBC, 33-37 Moreland St, London, EC1V 8HA by Friday June 29th.

# PAY SURVEY 2007 Continued

7) The annual bonus scheme motivates me to improve my productivity.

Strongly agree     Agree     Neither agree nor disagree   
Disagree     Strongly disagree

8) The bank is taking effective measures to achieve equal pay.

Strongly agree     Agree     Neither agree nor disagree   
Disagree     Strongly disagree

9) The performance pay system in HSBC improves employee performance.

Strongly agree     Agree     Neither agree nor disagree   
Disagree     Strongly disagree

10) My pay and benefits package makes me want to stay with the bank.

Strongly agree     Agree     Neither agree nor disagree   
Disagree     Strongly disagree

