

## Lloyds Banking Group Unite members update

# JOB LOSSES PROCESSES

### REDUNDANCY SELECTION

**Over the last few months, Unite has been in consultations with LBG about the selection process to be used for the current round of redundancies. With the tally currently standing at over 8000, it is vital that this process operates in a fair and transparent way.**

### CONSULTATION

**LBG has an obligation to consult with the union on any redundancies in the new group. This obligation and how it should be implemented is set out in the Job Security Agreements we have in place from LTSB and HBOS heritages and is underpinned by the law. The law says that this consultation must be carried out with a view to reaching agreement and a key element of it relates to how selection should be carried out.**

### UNITE HAS NOT AGREED THE SELECTION PROCESS

Unfortunately, despite extensive and detailed dialogue, Unite has not been able to agree the selection criteria. We have three main reasons for this.

- 1) Unite is continuing to argue that the employee going through the selection process should have the right to know the score they have been given before the selection takes place. Linked to this is our concern that there should be a way to formally and quickly appeal against your score. Without this, the person would have to take out a standard grievance at the same time as they are going through the selection process (which is unlikely to be completed before its outcome) or wait for the outcome and go to a job security appeal.
- 2) Unite is very concerned that potentially redundant staff referred on to the CREST redeployment service will not be given priority for job vacancies over other colleagues whose job is not at risk. Under the job loss programme undertaken by HBOS in 2008, where there was a potentially redundant colleague or colleagues with the right skills match, the job was guaranteed to go to them rather than to someone whose job was safe. Clearly the danger is that this decision may result in more compulsory redundancies than would otherwise be the case.
- 3) Unite has continuing concerns about the appraisal rating distribution curve being used rigidly by managers resulting in some colleagues being unjustifiably rated as partially-met. Since performance ratings are key to the selection scoring we believe this may result in some colleagues being unfairly selected for redundancy.

**Working for you in Lloyds Banking Group**

**Wendy Dunsmore and Gwyn Bates, Unite National Secretaries, Lloyds Banking Group**

## WHAT ARE THE SELECTION CRITERIA?

All job selection will be based on a scoring system which includes

### 1. Knowledge and Skills

A suite of knowledge and skills elements has been agreed. For each selection exercise the business Division uses up to 5 of these as appropriate for the job description and selection pool in question. 2 or 3 of these elements are selected as being the most important in order to more easily differentiate between candidates. The 14 elements are

- Oral Communication
- Written Communication
- Interviewing
- Presentation/Facilitation
- Self/Work Organisation
- Keyboard/Software Applications
- Performance Review and Development
- Budgeting
- Analytical Skills
- Project Management
- Change Management
- Organisational Awareness
- Environmental Awareness
- Procedural/Product/Specialist Knowledge (e.g. where a specific qualification is required e.g. CIPD or ACA/CIMA/ACCA)"

### 2. Performance Ratings

It is recommended that 4 cycles (2 years) of ratings are used. Where more recent half year ratings are available for the whole of the candidate pool, these should be used

An overall assessment will be made by the Line Manager in conjunction with HR and then validated by the next level of management to ensure the selection criteria have been objectively and consistently applied. The validation is not to amend scores or comments, purely to check a consistent, objective and fair approach has been taken.

Interviews may also be used but only as a further tie break where the desk-top outcome is not clear enough to justify selection.

## MAKING THE BEST OF THE SELECTION PROCESS

Even though we have not been able to reach agreement, Unite has worked hard to achieve some useful changes to the original version of the selection process.

Key elements that we have focussed on include

1. enabling those completing the Your Profile form to add a commentary re their concerns about previous appraisal ratings
2. using our concerns with the differences in average performance ratings between LTSB and HBOS in certain areas to argue for a reduced emphasis on these ratings in the selection scoring
3. ensuring there is clarity around the skills that will be used to select for each affected job
4. successfully arguing for a right of appeal under the job security agreements on grounds that the selection criteria were unfairly applied
5. seeking the best of both heritages in the treatment of those who have been absent for long periods – notably sickness or maternity leave
6. insisting on adequate training and guidance for selecting managers
7. consistently pushing the bank to consult the union on the wording of the selection guidelines
8. arguing against the use of geography as a selection criterion in particular where work could be done from a range of locations
9. debating the definition of selection pools especially where there is a lack of clarity about detail in a business case
10. insisting on a series of reviews of selection outcomes to check for consistency and fairness – this relates to the standard equality criteria as well as heritage
11. seeking the widest possible use of voluntary redundancy and voluntary bumping to help avoid compulsory redundancies.

## HELP FROM UNITE

**Anyone faced with having to go through a selection process should be briefed thoroughly by their line manager and supported throughout the process.**

**Unite has already helped numerous members through this and will continue to help and support all we can including at formal appeals. In the event of any members being selected for compulsory redundancy which seems to us to be unreasonable we will take legal advice and support members through tribunals if it became necessary.**

**Our aim however is to ensure we do everything possible to ensure that anyone leaving Lloyds Banking Group as a result of these current round of job losses does so by voluntary means.**

**Members seeking help or advice should call our helpline on 08081 449595 or e mail [lbg.support@unitetheunion.com](mailto:lbg.support@unitetheunion.com)**

## CREST

As part of the job losses consultation process we are now having regular updates from the CREST redeployment support team.

These updates will include statistics on the success of the service in placing displaced colleagues into alternative roles.

We have been making representations about the service provided by CREST following negative feedback from our members.

We were told that the team is adequately resourced to meet the demand provided all the information they require is provided to them at the right times by the business areas going through change.

We raised with them the delays in colleagues receiving quotes for early payment of pensions which have been reported to us.

We understand that provided they receive the right information from the business area at the right time, quotes can be provided when contact is first made between the colleague and CREST.

We are therefore interested in members' further feedback on their experiences recently with this aspect.

With regard to job matching the CREST processes appear to be robust with the right mix of technology based tools and manual effort to ensure efficiency.

Of course this is still early days and the team are not yet dealing with the highest predicted volumes, however data received thus far does seem to indicate that a good proportion of vacant roles are being filled by colleagues referred to hiring managers by CREST.

We will of course continue to press for all vacancies to be filled by colleagues referred to CREST wherever possible (see above).

We will of course continue to monitor the service and we need our members to keep feeding back to us any issues or problems they experience.

## BUMPING

As mentioned in previous Unite Newsletters Unite has pushed for Lloyds Banking Group to avoid compulsory redundancies by the use of "Bumping".

By this we mean Colleagues, whose jobs are not at risk, being able to leave on Voluntary redundancy to create a job opportunity for another colleague who is at risk of compulsory redundancy.

We are pleased to report that Bumping Forums now take place at divisional level to try to facilitate this and some bumping has already taken place successfully and we expect more to come through in the next few months.

The Company will not open a voluntary redundancy register to facilitate this but CREST is holding details of people willing to consider this. Members wishing to explore this should speak to their line manager and/or Local HR business partner. Unite members can also register their interest with us by sending an e mail to [lbg.support@unitetheunion.com](mailto:lbg.support@unitetheunion.com) requesting your name be added to our list. We need the following details

- Name
- Current Job title
- Job Grade
- Work Location
- LBG Division and Business area
- Whether full or part time (including how many hours per week)
- Whether you have notified your line manager

This information will be passed to CREST and we will also review the list ourselves and make "bumping" suggestions to the business as appropriate.



## HARMONISATION OF TERMS AND CONDITIONS OF EMPLOYMENT

Consultation meetings will shortly commence on the harmonisation of LTSB and HBOS terms and conditions of employment. Unite's stated aim will always be to seek to achieve the best of both heritage's terms. In reality we expect there will be a mix and some brand new proposals.

Unite will work together with our sister Union Accord throughout these discussions. We regret that LTU will still not join forces with us on this to ensure we have a truly united approach to what will be a very significant set of negotiations affecting all Lloyds Banking Group colleagues.

As a democratic union Unite is fully committed to consulting its members in detail about the proposals at the appropriate time.



## DO WE KNOW WHERE YOU ARE?

In order to ensure our consultation exercise is as robust as we can make it, we need to be sure that our membership records are accurate including both workplace and personal details so that no members are denied the right to have their say on this.

Members can check and amend their details by logging on to [www.unitetheunion.com](http://www.unitetheunion.com) and go to My Unite (click on the box on the top right hand corner of the home page.) From there you can submit "my details" and "my Job" information.



**Please share this newsletter with colleagues but Unite must make it very clear that we can only provide individual help and support to our members.**

**Non members can join on-line at [www.unitetheunion.com](http://www.unitetheunion.com) or call our helpline on 08081 449595 for a membership application form.**