

## YOUR LIFESTYLE. YOUR CHOICES.

### Advice for Unite members

#### FOR PHONEBANK ADVISORS AND TEAM LEADERS:

Unite has been consulted in detail over the past few weeks about the decision to implement the new shift structure for Direct Banking – ‘Lifestyle Choices’ detailed in the ‘Preferencing Packs’ which staff will receive shortly.

**Your Preferencing Pack will give you information and instructions on selecting from the working patterns in Lifestyle Choices.**

**Unite Representatives working in Direct Banking have been involved in these discussions to ensure we have fully represented our members’ interests. Direct Banking has taken on board many of the issues we raised and as a result have made a number of amendments to their proposals.**

**Phonebank will be the first advisor and team leader population in Direct Banking to make their choices.**

#### HOW WILL THIS AFFECT ME?

You will be invited to consider the Lifestyle Choices and select working patterns that are suitable for you. You should fully consider which working patterns are right for you when making your preferences as once your Lifestyle Choice has been agreed this work pattern and hour of work will become part of your contract of employment. Unite is encouraging our members and staff to take the time to think carefully about the choices available to them and fully consider what options are suitable before making their preferences.

#### WHY DO I NEED TO SIGN A NEW CONTRACT AND WILL THERE BE ANY OTHER CHANGES TO MY CONTRACT OF EMPLOYMENT?

The benefit of the new contract appears to be that you will have the certainty of fixed shifts and no longer be on a fully flexible contract as many members and staff were before. Only your working pattern and possibly hours of employment may change as a result of Lifestyle Choices. The rest of your terms of employment will remain the same.

#### WILL ALL PHONEBANK STAFF HAVE TO SELECT PATTERNS FROM THE LIFESTYLE CHOICES?

All Phonebank advisors are expected to select from the shift patterns available. For some Unite members and staff Lifestyle Choices will not represent a change, as flexibility has been a regular part of their hours of work. We welcome the fact that members will now have the opportunity to select a working pattern that may better support their work-life balance.

Some members and staff may find their current working pattern is not offered as part of Lifestyle Choices. You should review the shift patterns available and only select preferences that would be suitable to you.

Once your shift pattern is agreed Direct Channels reserves the right to flex your patterns by a maximum of one hour, if business needs require. You will be given a minimum of 4 weeks notice if Direct Channels choose to flex your Lifestyle Choice. Direct Channels have agreed with Unite to be sympathetic when considering commitments members and staff may have outside of their shift pattern.

#### WILL I RECEIVE MY FIRST PREFERENCE IN LIFESTYLE CHOICES?

The availability to grant advisors their first selection will depend on advisor preferences. If Direct Channels are unable to accommodate all first preferences then a selection process will be used to determine the allocation of work patterns.

## Working for you in Lloyds Banking Group

**William Thomson, Unite Senior Representative**

**Gwyn Bates, Unite National Secretary**

## WHAT WILL THE SELECTION PROCESS BE?

At present Unite and Direct Banking are continuing to consult to agree on a fair and equitable selection process if staff cannot be granted their first preference. The selection of advisors for shift patterns will only take place after the preferencing window has closed. Preferences will not be allocated through first come first served. Members should take the full time available during preferencing to select suitable options.

## HOW MANY LIFESTYLE CHOICES CAN I PREFERENCE?

Unite has been informed that the system advisors will use to select their preferences will not accept a submission of less than 4 choices. We have received the following response from Direct Channels as how advisors should proceed if forced to select unsuitable working patterns.

'If the advisor cannot work some of the options they select then this needs to be flagged to the on-site HR Business Partner so the options can be manually removed when the analysis begins.'

Unite advises that members send written correspondence to their HR business partner clearly stating which of the selected Lifestyle choices are suitable for them. Please also keep a copy for your own records.

## MY EXISTING WORK PATTERN IS NOT AVAILABLE AND I AM UNABLE TO COMMIT TO ANY OF THE CHOICES. WHAT SHOULD I DO?

If none of the patterns are suitable you should request a meeting with your line manager to discuss your options. You should prepare to have an open and honest discussion explaining why you are unable to preference. You may then have a subsequent meeting with an HR representative to try to agree a way forward.

Unite members can contact us for further advice about this and if you feel you need support at the meeting, the bank will not object to you being accompanied by a Unite representative.

## MY WORKING PATTERN HAS BEEN AGREED THROUGH THE LLOYDSTSB WORK OPTIONS POLICY. DO I NEED TO PREFERENCE A 'LIFESTYLE CHOICE'?

Members and staff may wish to change from their Work Options pattern and if this is the case should preference accordingly. Members whose circumstances fit this category should be mindful that 'Lifestyle Choices' may flex by one hour. Unite has made representations to Direct Banking that staff whose personal circumstances are consistent with statutory flexible working legislation should be allowed to remain on their Work Options pattern. You should only agree to change these hours if it suits you. We will continue to consult on this matter.

Statutory legislation gives certain workers the right to request flexible working (ie. those with children under 6, with disabled children and with other certain caring responsibilities). Unite believes that these agreed Work Options should be respected. You should only select a Lifestyle Choice if one is suitable to you. In all other circumstances, please arrange a meeting with your Team Leader to discuss your situation.

## HOW IS UNITE INVOLVED?

Unite has been in consultation with Direct Banking and we will continue to meet with Direct Banking throughout the Lifestyle Choices preferencing and implementation. We have clearly stated that any changes to existing shift patterns should be through agreement only. Unite has proposed that members have the right to request representation at an appropriate stage of the preferencing process.

## WILL I HAVE THE CHANCE TO DISCUSS MY CHOICES WITH A REPRESENTATIVE FROM UNITE?

Unite has workplace representatives in many Telephony sites who will be available during the preferencing period to provide help and support to members and staff.

We will be visiting all sites where members and staff are being asked to preference. We will arrange visits for a suitable date between members receiving their packs and the opening of the window for members and staff to make their choices. Members and staff will be advised in advance of visits by Unite representatives.

As our consultations with Direct Banking are ongoing we will keep staff informed with regular communications.



## Need further advice?

Members can contact the  
**Unite Lloydtsb helpline**  
**0808 144 9595.**

## NOT YET A MEMBER?

Membership subscriptions are £5.77 per month for full time staff and £3.17 for part time staff.

In addition, you will receive the first three months of your membership completely free.

To join visit our website on  
**[www.unitetheunion.org.uk](http://www.unitetheunion.org.uk)** or  
call the Unite Lloydtsb helpline on  
**0808 144 9595**