

**Report to:** Cabinet

**Date:** 15<sup>th</sup> August 2016

**Report of:** Director of Place

**Report No:** XXX

**Contact Officer:** Stephen Young – Director of Place **Tel No:** 336301

**Report Title:** **Corporate Property Services Review Phase 1 –  
Post Consultation Report**

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**Confidential /  
Non Confidential:**

**(Confidential Not for Publication)**

This report is exempt from publication by virtue of Paragraph 1 of Schedule 12A to the Local Government Act 1972.

**Purpose:**

To set out the results of consultation on Phase 1 proposals which:

- review the current Corporate Property Services staffing structure
- achieve £454,503 of Phase 1 efficiencies, which contribute to the overall £613,000 of efficiencies, through a two phased review of Corporate Property Services.

To seek approval from the Cabinet to implement the final proposals.

**Recommendations:**

The Cabinet is recommended to:

- Approve the final proposals; and
- Subject to the approval of the Head of Paid Service in consultation with the Leader, delegate implementation of the new structure, including voluntary early retirement/voluntary severance applications, to the Director of Place.

**Decision:**

**Background Doc(s):**

[Consultation Report – April 2016](#)

**Summary:**

An Executive Summary is set out within the report below which includes the following appendices:

- Appendix 1 Summary of Consultation Responses
- Appendix 2 Trade Unions' Response
- Appendix 3 Current Organisational Structure
- Appendix 4 Final Organisational Structure
- Appendix 5 Equality Impact Assessment

Please note that relevant Job Descriptions and Person Specifications are available on request.

## **1.0 Executive Summary**

- 1.1 At its meeting on the 10<sup>th</sup> November 2014, the Council's Cabinet approved the start of the consultation process on a programme of savings covering the years 2015/16 and 2016/17. The Council subsequently approved savings options in February 2015, following the December 2014 Local Government Settlement, in order to meet an increased savings target of £43.4m for the 2015/17 period.
- 1.2 This report sets out the results of the formal consultation process on Phase 1 of a two phased approach to achieve £613,000 efficiencies through a review of Corporate Property Services (CPS) and contains the final proposals in response. Phase 1 efficiency savings amount to £454,503. The proposals indicate a potential overall reduction in staff establishment by 25.56 FTEs from 66.20 FTEs to 40.64 FTEs.
- 1.3 In addition, it is proposed to create a strategic maintenance budget of £99,799, to tackle backlog property maintenance, in order to deliver the Council's strategy for its property portfolio, with a view to ensuring that it is fit for purpose.
- 1.4 It is anticipated that the proposals detailed in this report will be implemented by 1<sup>st</sup> September 2017 should they be approved.

## **2.0 Background to the Review**

- 2.1 On 11<sup>th</sup> April 2016, the Cabinet approved a report setting out the need for a two phased review of CPS and draft proposals for changes to the Service's structure and operations, for consultation with Trade Unions and staff. CPS sits within the Department of Place and is responsible for the management of the Council's property portfolio, which is currently valued at approx. £447m.
- 2.2 The Service provides property opportunities across Bolton for business tenants, prospective landowners, and developers, and is responsible for managing and letting a wide variety of council owned commercial land and buildings, including shops, offices, industrial units, warehouses, business parks, community buildings, parks and open spaces, car parks and grazing land. The Service also disposes of properties which are surplus to the Council's requirements, including commercial, industrial and mixed use sites, and non-commercial properties, houses, former schools, care homes and libraries for development and regeneration. The Service currently employs 66.20 FTEs; the current staffing structure can be found at Appendix 3.
- 2.3 The proposals as set out in this report put forward recommendations to implement a revised model of service delivery through the reorganisation and review of its functions, including partnerships with other public sector bodies and the private sector. Initiatives such as One Public Estate and integrated Health and Social Care mean increased working with, and development of, joint multi-agency service provision. It is in this context that the review of the operations of CPS is recommended to be progressed.
- 2.4 In light of the Council's current budget reductions, it is essential to create a team with the right skills to deliver a high quality service to our customers. Whilst in general terms, as a result of the property rationalisation programme and disposals, the Council's portfolio of property is decreasing, the input and experience required to manage and maximise the benefits of holding such a portfolio have increased. In

addition, given current austerity measures, the need to maximise the return from land and property is paramount. In order to benefit from this proposition, the requisite expertise and resource needs to be available to exploit available opportunities.

2.5 The proposals indicate a potential overall reduction within the staff establishment of 25.56 FTEs from 66.20 FTEs to 40.64 FTEs. The proposals, if agreed, would make a contribution of £313,000 to the savings target, and £300,000 to address the current budget pressures on the service. Phase 1 savings total £454,503.

2.6 As a result of extensive business re-engineering and the number of voluntary severance/voluntary early retirement requests already received, it is anticipated that compulsory redundancies should not be necessary, subject to VER/VS requests being taken up and successful recruitment into senior posts.

### **3.0 Consultation Process**

3.1 At its meeting on 11<sup>th</sup> April 2016, the Cabinet approved the start of consultation on proposals for Phase 1 of the Corporate Property Services review. "At risk" letters were subsequently issued to affected staff. Formal consultation on the proposals finished on 4<sup>th</sup> July 2016.

3.2 Key elements of the formal consultation have included:

#### Staff

- A formal briefing session and presentation for all staff on 12th April 2016;
- Maintenance of a staff teamsite using SharePoint, for staff to access information, and a dedicated email address to contact the project team;
- Holding individual meetings with members of staff, attended by HR and/or trade union representatives where requested;

#### Trade Unions

- Meetings with trade unions and a Question and Response Log completed and shared with trade unions;
- Responding to specific requests for information from the trade unions;
- Access to all job descriptions, person specifications and job evaluation information;

### **4.0 Key issues raised through formal consultation**

#### Staff

4.1 A Question & Answer Log has been maintained for issues raised directly from staff. The main issues raised are:

- Clarification on specific job roles and remuneration.

## Trade Unions

4.2 The formal Trade Unions' responses to the proposals are set out in full at Appendix 2, along with the corresponding management responses. In summary, the main issues raised by the Trade Unions are:

- Request to transfer the Financial Support Team Leader post to the Finance & Business Development Division
- Clarification and further information requested on the duties which are ceasing and diminishing
- Request to delay the transfer of the Helpdesk function, pending further details

4.3 A summary of the issues raised by both staff and trade unions and the associated Management response can be found at Appendix 1. A copy of the full staff and trade unions' consultation log and associated documentation are available on request.

## **5.0 Proposed Changes Arising**

5.1 Following consultation, Management considered the points made and have agreed the following amendments within the final proposals:

- Amendments to the Data Property Officer job description
- Transfer of the Financial Support Team Leader post to the Finance & Business Development Division

5.2 These changes have resulted in a reduction in the overall efficiencies savings for Phase 1. The total efficiency savings for Phase 1 is £454,503.

## **6.0 Financial Information**

6.1 As part of the two phased review process, a zero based budget approach of Corporate Property budgets has been undertaken. Whilst analysing the budgets, £300,000 of external income pressures have been identified, taking the budget savings target to £613,000.

6.2 In Phase 1, the proposal is to reduce the budget by £454,503. The table below shows the breakdown of how the savings are to be realised. A prudent approach has been taken and a budget has been created to address the planned maintenance backlog and statutory compliance areas.

### 6.3 Table 1a: Financial Breakdown

| Subjective         | Budget 16/17 prior to Savings | Transfer of support Functions | Revised Budget 16/17 |
|--------------------|-------------------------------|-------------------------------|----------------------|
| Employees          | 2,602,300                     | -378,350                      | 2,223,950            |
| Premises           | 5,513,900                     | -7,200                        | 5,506,700            |
| Transport          | 54,600                        | -25,400                       | 29,200               |
| Supplies           | 1,150,232                     | -3,800                        | 1,146,432            |
| Third Party        | 575,300                       | 0                             | 575,300              |
| Central Support    | 911,400                       | -100                          | 911,300              |
| Capital            | 1,128,800                     | 0                             | 1,128,800            |
| Income             | -11,599,000                   | 190,000                       | -11,409,000          |
| <b>Grand Total</b> | <b>337,532</b>                | <b>-224,850</b>               | <b>112,682</b>       |

**Table 1b: Saving Allocation**

|                                |                 |
|--------------------------------|-----------------|
| Salary Saving                  | -689,302        |
| Castle Hill Occupancy Strategy | 135,000         |
| Planned Maintenance (backlog)  | 99,799          |
| <b>Total Phase 1 Saving</b>    | <b>-454,503</b> |
| Made up of:-                   |                 |
| Efficiency Option              | 313,000         |
| Demand Led Income              | 141,503         |

## 7.0 Staffing Implications

- 7.1 The proposed new staffing structure is provided at Appendix 4. Tables 2 to 11 below set out the detail of the changes proposed to the current structure. Subject to approval of the proposals, staff in a VS/VER/Redundancy situation will be managed and supported in line with the Council's restructure, redundancy and redeployment policy framework. All new posts have been evaluated through the Council's pay and grading process in line with HR policy. The main areas that are being realigned and have implications for the staffing structure are highlighted below.
- 7.2 As part of the consultation period, 14 applications for VER/VS were received from eligible staff within the Service. Management has considered these applications against future demands on the service and recommend that 6 requests be approved. These are listed below. 8 requests for VER/VS were not approved because the posts are required for future service delivery or are being transferred to other services across the Council.

**Table 2: Requests for VER/VS have been received from the following post holders. If approved this would have a substantial impact on the staffing implications detailed in tables 10 to 11:**

| FTE  | Existing Job Title                  |
|------|-------------------------------------|
| 1.00 | Special Projects Co-ordinator G13   |
| 1.00 | Mechanical & Electrical Manager G10 |
| 1.00 | Strategic Facilities Manager G9     |
| 1.00 | Project Manager G9                  |
| 1.00 | Senior Energy Surveyor G8           |
| 1.00 | Energy Manager G7                   |

**Table 3: The following posts are currently held vacant and will be disestablished:**

| FTE  | Existing Job Title                           |
|------|----------------------------------------------|
| 1.00 | Head of Operational Asset Management G14     |
| 1.00 | Operational Facilities Manager G11           |
| 1.00 | Projects Manager G11                         |
| 1.00 | Statutory Compliance and Records Manager G10 |
| 1.00 | Senior Project Manager G9                    |
| 1.00 | Project Manager G9                           |
| 1.00 | Mechanical & Electrical Officer G8           |
| 1.00 | Client Officer G8                            |
| 1.00 | Building Surveyor G6                         |
| 1.00 | Finance and Administration Officer G5        |
| 1.76 | Assistant Caretaker Handyperson G1           |

**Table 4: The following posts are directly comparable and will be slotted in:**

| FTE  | Existing Job Title                            |
|------|-----------------------------------------------|
| 1.00 | Estates and Property Manager G11              |
| 0.65 | Principal Surveyor Acquisitions/Disposals G10 |
| 1.00 | Principal Surveyor General Manager G10        |
| 1.00 | Principal Surveyor Industrial Management G10  |
| 4.45 | Senior Surveyor G9                            |
| 1.00 | Compliance Project Officer G9                 |
| 1.00 | Mechanical & Electrical Officer G8            |
| 1.00 | Career Grade Surveyor G7                      |
| 2.00 | Career Grade Surveyor G5                      |
| 2.89 | Property Data Officer G5                      |
| 1.60 | Technical Support G4                          |
| 1.00 | Estate Assistant G4                           |

**Table 5: The following posts are new and will be filled in line with HR policy:**

| FTE  | Existing Job Title       |
|------|--------------------------|
| 1.00 | Head of Service G14      |
| 1.11 | Property Data Officer G5 |

**Table 6: The following posts are part of the current structure and would be transferred to another Division/Department:**

| FTE  | Existing Job Title                       |
|------|------------------------------------------|
| 1.00 | Supervisor. Mobile Handyperson Team G4   |
| 2.00 | Caretaker Handyperson Mobile G3          |
| 2.24 | Assistant Caretaker Handyperson G1       |
| 1.00 | Commissioning and Procurement Officer G6 |
| 1.00 | Financial Support Team Leader G9         |
| 1.75 | Finance and Administration Officer G5    |
| 1.00 | Performance Monitoring Officer G4        |

**Table 7: The following posts are part of the Corporate Administration and Business Support Review and are therefore out of scope of this review:**

| FTE  | Existing Job Title           |
|------|------------------------------|
| 1.00 | Help Desk Supervisor G6      |
| 4.95 | Customer Services Officer G3 |
| 1.00 | Personal Assistant G3        |

**Table 8: The following posts would be redundant from the current structure, however, there is a suitable alternative new position in the proposed structure and this post will be offered as a slot in:**

| FTE  | Proposed Job Title          | FTE  | Existing Job Title               |
|------|-----------------------------|------|----------------------------------|
| 5.00 | Asset Management Officer G8 | 3.00 | Client Officer G8                |
|      |                             | 1.00 | Property Support Officer G8      |
|      |                             | 1.00 | Client Officer (Career Grade) G7 |

**Table 9: The following post would be redundant from the current structure, however, there is a suitable alternative new position in the proposed structure and this post will be offered as a slot in. As this post is at a lower grade, the post holder affected will be subject to a 2 year salary protection in accordance with HR policy:**

| FTE  | Proposed Job Title       | FTE  | Existing Job Title                    |
|------|--------------------------|------|---------------------------------------|
| 1.00 | Property Data Officer G5 | 0.92 | Service Development Policy Officer G6 |

**Table 10: The following posts are new. However, there are more people than comparable posts in the following roles. These individuals will be subject to a redundancy selection exercise for a post in the new structure, in line with HR policy:**

| FTE  | Proposed Job Title  | FTE  | Existing Job Title                  |
|------|---------------------|------|-------------------------------------|
| 2.00 | Service Manager G11 | 1.00 | Mechanical & Electrical Manager G10 |
|      |                     | 1.00 | Strategic Facilities Manager G9     |
|      |                     | 2.00 | Performance Facilities Officer G9   |
|      |                     | 1.00 | Senior Building Surveyor G9         |
|      |                     | 1.00 | Senior Project Manager G9           |
|      |                     | 2.00 | Project Manager G9                  |
|      |                     | 1.00 | Senior Quantity Surveyor G9         |
| 3.00 | Team Leader G9      | 1.00 | Mechanical & Electrical Manager G10 |
|      |                     | 1.00 | Strategic Facilities Manager G9     |
|      |                     | 2.00 | Performance Facilities Officer G9   |
|      |                     | 1.00 | Senior Building Surveyor G9         |
|      |                     | 1.00 | Senior Project Manager G9           |
|      |                     | 2.00 | Project Manager G9                  |
|      |                     | 1.00 | Senior Quantity Surveyor G9         |

**Table 11: Following the redundancy exercise in Table 10, the following posts will be subject to a redundancy selection exercise for a post in the proposed structure. The post holder will be subject to a 2 year salary protection in accordance with HR policy.**

| FTE  | Proposed Job Title          | FTE  | Existing Job Title                  |
|------|-----------------------------|------|-------------------------------------|
| 1.00 | Asset Management Officer G8 | 1.00 | Mechanical & Electrical Manager G10 |
|      |                             | 1.00 | Strategic Facilities Manager G9     |
|      |                             | 2.00 | Performance Facilities Officer G9   |
|      |                             | 1.00 | Senior Building Surveyor G9         |
|      |                             | 1.00 | Senior Project Manager G9           |
|      |                             | 2.00 | Project Manager G9                  |
|      |                             | 1.00 | Senior Quantity Surveyor G9         |

## 8.0 Timetable

| Timescale                   | Activity                                                                                                                                                                                                                                                                           |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| September 2016 - March 2017 | Recruitment/slotting in process: <ul style="list-style-type: none"> <li>• Head of Service</li> <li>• Service Managers</li> <li>• Team Leaders</li> <li>• Compliance Project Officer</li> <li>• Asset Management Officers</li> <li>• Mechanical &amp; Electrical Officer</li> </ul> |

|                             |                                                                                                                                                                                                             |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | <ul style="list-style-type: none"> <li>Property Data Officers</li> </ul> <p>Release of identified VER/VS applicants and agency staff, as per business need, following knowledge/skills transfer process</p> |
| March 2017 – September 2017 | Release of remaining VER/VS applicants and agency staff, as per business need, following knowledge/skills transfer process                                                                                  |

## 9.0 Equality Impact Assessment

9.1 Under the Equality Act 2010, the council must have due regard to:

- Eliminating unlawful discrimination, harassment and victimisation and any other conduct prohibited by the Act
- Advancing equality of opportunity between people who share a protected characteristic and people who do not share it
- Fostering good relations between people who share a protected characteristic and people who do not share it

9.2 It is therefore important to consider how the proposals contained within this report may positively or negatively affect this work. To support this analysis, an Equality Impact Assessment (EIA) has been carried out on the proposals outlined in this report, and is attached at Appendix 5.

9.3 The EIA looks at the anticipated (positive and/or negative) impacts of the proposal on people from Bolton's diverse communities, and whether any group (or groups) is likely to be directly or indirectly differentially affected. This Equality Impact Assessment builds on the equality screening which was completed on the initial review options, and summarises the stakeholder consultation which has been completed as part of this review.

9.4 It is not anticipated that the proposals will have a differential effect on any of Bolton's diversity groups. However, should the proposals be approved by the Cabinet, they will be kept under review as part of the overall budget process.

## 10.0 Recommendations

10.1 The Cabinet is recommended to:

- Approve the final proposals; and
- Subject to the approval of the Head of Paid Service in consultation with the Leader, delegate implementation of the new structure, including voluntary early retirement / flexible retirement / voluntary severance applications, to the Director of Place.

## Appendix 1 - Summary of Consultation Responses

TU= Trade Unions (Unison and GMB) S = Staff

| Raised by | Query/Issue Raised                                                                                    | Management Response                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| S         | Report states that the Helpdesk Supervisor post is vacant and proposes to be deleted. Please clarify. | The Helpdesk Supervisor post is vacant and has been covered by a member of staff through an honorarium arrangement. However, as is normal procedure, all postholders revert back to their substantive post whilst in a service review situation.                                                                                                                                                                            |
| S         | Feel that the Data Property Officer job description does not reflect current duties                   | In order to ensure resilience of service delivery, it is proposed that all five Data Property Officer roles are generic and that all current and future requirements are covered by all staff within those posts. The refreshed job description has been designed for the Data Property Officer posts to have an awareness of all data and information systems and an understanding of how to access and use these systems. |
| TU        | Clarification and further information requested on the duties which are ceasing and diminishing       | A cease & diminish list was provided to the TUs on 22.04.16. Following a request for further information, a more detailed rationale behind the proposed restructure was emailed to the TUs on 13.05.16. In addition, following a request from staff and the TUs, a presentation on the rationale behind the restructure was given on 24 <sup>th</sup> June 2016.                                                            |
| TU        | Request to delay the transfer of the Helpdesk function, pending further details                       | It is proposed that the helpdesk function and its associated staff be transferred to Access Bolton as part of this review. Management gave assurances that the integration process will be detailed in the Cross Cutting Phase 2 Report, due to start consultation in late summer 2016.                                                                                                                                     |
| TU        | Clarification on the future arrangements of agency workers in the proposed structure                  | There will be a transitional period where knowledge and skill sharing is essential. The length of this period is unknown, however Management envisage this to be between 12 – 18 months after the approved implementation date. After this period, all agency contracts will be terminated.                                                                                                                                 |
| TU        | Clarification on the out of hours rota                                                                | Management do not propose a change to current out of hour arrangements.                                                                                                                                                                                                                                                                                                                                                     |
| TU        | Clarification on the financial information provided for the review                                    | The proposed structure will meet the future needs of the service and the appropriate revenue budget has been allocated. This includes the finances identified in Table 1b in the Corporate Property Services Review dated 11th April 2016. A separate finance meeting with the TUs was organised on 20.05.16, where the financial data was explained.                                                                       |



### **Corporate Property Services Review**

#### **Joint UNISON and GMB Response**

**Service Review  
Department of Place  
July 2016**

#### **1.0 Introduction**

- 1.1 The service review of Corporate Property Services is being undertaken in two phases. This consultation relates to Phase 1, which proposes a budget reduction of £500,000. Management propose a further £113,000 savings as part of Phase 2 proposals, which Unison and GMB are advised will be consulted on later in the current financial year. This report is based on the feedback from UNISON and GMB members who have attended and fed into member meetings and does not take into account any queries made directly to management.
- 1.2 During the consultation period UNISON and GMB have engaged in weekly meetings with management up until our members lodged a dispute over the proposals. We have also met with our members on a number of occasions and management have met our requests to facilitate those meetings.
- 1.3 At the informal briefing with the Director, on Tuesday 5<sup>th</sup> April 2016, we expressed our concerns about the consultation period of 60 days not being long enough and that we were doubtful that the consultation could be meaningful and fully completed in the given timescales.
- 1.4 In general, information from management has not been sent to us in a timely manner. On a number of occasions we received the latest Q&A Log at a consultation meeting as information was not provided to us in advance.

Fundamental to the review is the Cease and Diminish List, which management failed to include in the original proposals. The first Cease and Diminish list was sent to us on 22<sup>nd</sup> April, which is more than a week after consultation opened. This list didn't include any of the redundant posts in Tables 10 and 11 of management's original service review report.

- 1.5 At the start of the consultation period a number of existing Job Descriptions were not made available. UNISON and GMB do not consider it unreasonable to expect that all information is made available at the start of every service review. Indeed, we would contend that consultation cannot be meaningful without such information being made available to us. At the time of writing, management have still failed to provide a Job Description for one of the posts that they are proposing to make redundant. We fail to understand how management can make proposals to disestablish a post when they do not have an existing Job Description to refer to.

#### **Management's Response:**

The consultation period was 81 days from 13<sup>th</sup> April 2016 to 4<sup>th</sup> July 2016. All questions submitted by the Trade Unions were answered in a timely manner through the Question & Response Log, which was emailed to the TUs prior to the weekly consultation meetings. Management asked if there were any further questions during the consultation meetings on 14<sup>th</sup> and 24<sup>th</sup> June 2016. No further questions from staff and TUs were submitted. It was therefore agreed that the consultation period would cease on 4<sup>th</sup> July 2016. The cease & diminish list was sent to the TUs on 22<sup>nd</sup> April 2016 prior to the first consultation meeting on 26<sup>th</sup> April 2016. The posts identified in Table 11 of the consultation report were not originally included in the cease & diminish list as the Director wished to discuss the rationale behind the restructure during the initial consultation meetings. Following on from these initial discussions, a more detailed cease & diminish information note was distributed to the TUs on 13.05.16. All job descriptions except those for the Senior Energy Surveyor and the Asset Management Team Leader posts were made available on the staff teamsite on 20<sup>th</sup> April 2016. The Senior Energy Surveyor and the Asset Management Team Leader job descriptions were placed on the staff teamsite on 19<sup>th</sup> May 2016 and 7<sup>th</sup> June 2016 and were omitted in error.

## **2.0 UNISON and GMB Analysis**

### **Collective Dispute**

- 2.1 On 23<sup>rd</sup> May 2016 our members submitted a collective dispute because of management's failure to address their concerns regarding a number of matters in the review.
- 2.2 The main areas of concern for our members were (and largely remain) as follows:
- The proposed structure is flawed in that it is based partly on which members of staff have applied for Voluntary Early Retirement (VER) or Voluntary Severance (VS) rather than on management's vision is for service delivery and functions of CPS. UNISON and GMB contend that the proposals are not based on the needs of the service and our members are yet to see evidence that the Council's proposals are "fit for purpose".
  - The Council's review document states that the CPS Helpdesk (6.95 FTE) is out of scope of this review as these posts were included as part of the Phase 1 Administration review. However, during consultation meetings with management it became apparent that there are proposals to physically relocate the CPS Helpdesk, which will have implications in terms of reporting procedures, day-to-day working with CPS colleagues, etc. These additional proposals are not acceptable as these staff are out of scope of this restructure and any proposed changes to their current working practices should be encompassed in Phase 2 of the Admin Review.

- A full and exhaustive Cease and Diminish list of all the redundant posts – together with agency workers’ posts – has not been produced by management. Instead a rationale for the review was produced and we consider this wholly inadequate in that it consists of a rationale for reducing tasks rather than a comprehensive list of specific duties and responsibilities which will cease or diminish.
- 2.3 When members of UNISON and GMB agreed to enter into collective dispute, the joint-TUs had exhausted the internal industrial relations machinery beforehand. We had attended and engaged with management at four formal consultation meetings. We had also attempted to resolve the reasons for this dispute by referring the matter to the Borough Treasurer, Sue Johnson, on 13<sup>th</sup> May 2016.
- 2.4 Furthermore, on the 10<sup>th</sup> June 2016, in the spirit of good industrial relationships and with the aim of resolving our members’ dispute, UNISON and GMB provided a further note which we sent to the Borough Treasurer and the Head of HR, Shaun Wheeler. *A copy of this note is attached at Appendix 1.*
- 2.5 In response to this note, UNISON and GMB attended a meeting with the Borough Treasurer. We had assumed that this was a meeting to discuss our members’ dispute, however management have maintained that this was a consultation meeting. Our position since our members entered into dispute has been that consultation cannot continue until the dispute has been resolved.
- 2.6 **At the time of writing, our members are still formally in dispute with the Council and, at a member meeting held on 29<sup>th</sup> June 2016, voted to be balloted for industrial action.**

**Management’s Response:**

Noted.

Management’s response to the Trade Unions’ collective dispute letter can be found below on P.23

**CPS Help Desk**

- 2.7 Paragraph 7.13 of the Director of Place’s report to Cabinet dated 11/04/16 states that the CPS Helpdesk (6.95 FTE) is out of scope of this review as these posts were included as part of the Phase 1 Administration review.
- 2.8 However, during consultation meetings with management it became apparent that there are proposals to physically relocate the CPS Helpdesk, which will have implications in terms of reporting procedures, day-to-day working with CPS colleagues, etc.
- 2.9 UNISON and GMB have formally proposed – and reiterated the same proposal in our members’ dispute – that the CPS Helpdesk should remain on the 3<sup>rd</sup> floor, working alongside CPS colleagues until such a time that the functions are reviewed as part of Phase 2 of the Corporate Administration Review.
- 2.10 **Management have not agreed to our proposals and we therefore reiterate our request that management withdraws all plans to physically relocate the CPS Helpdesk.**

**Management’s Response:**

The proposal is to purely ‘lift and shift’ the Helpdesk function into the Chief Executive’s Department and will involve a change in physical location of the CPS Helpdesk. There are no proposals at this moment in time to change working conditions and practices. If there is a requirement to review the CPS helpdesk in the future, it will be part of a wider Contact Centre service-led review, where staff and Trade Unions will be consulted as per the agreed corporate process.

## Service Development Policy Officer post

- 2.11 Table 10 of the Director of Place's report to Cabinet dated 11/04/16 includes a proposal that the existing Service Development Policy Officer post (Grade 6) (0.92 FTE) is dis-established and the postholder is offered a slot in to one of the proposed new Property Data Officer posts (Grade 5) subject to a 2 year salary protection.
- 2.12 One of the posts on the existing Corporate Property Services' structure is the vacant Commissioning & Procurement Officer (Grade 6). Management propose to transfer this vacant post to the Procurement Team within the Chief Executive's Department.
- 2.13 UNISON has proposed that the post holder of the Service Development Policy Officer post is slotted into the vacant Commissioning & Procurement Officer post, which is at the same salary grade.
- 2.14 UNISON's proposal has been rejected by Management on the basis that the existing post does not qualify for a slot in given the post holder is not currently undertaking 50% or more of the responsibilities and duties of the Commissioning & Procurement Officer post.
- 2.15 The post holder of the Service Development Policy Officer post wasn't issued with a Job Description when she transferred from the Council's Internal Audit Section and despite UNISON's requests during the CPS Service Review consultation period, the post holder still hasn't been issued with a Job Description or at least a list of Responsibilities and Main Duties in relation to her post.
- 2.16 **UNISON and GMB are therefore requesting that Management reconsider their recommendation regarding the Service Development Policy Officer post and agree to the trade unions' proposal to slot the post holder into the vacant Commissioning & Procurement Officer post.**

### **Management's Response:**

The existing Service Development Policy Officer cannot be directly slotted into the vacant Commissioning & Procurement Officer post because their current duties are not 50% or more of the duties within the Commissioning & Procurement Officer post. However, there is a suitable alternative new position in the proposed structure and this post will be offered as a slot in. The vacant Commissioning & Procurement Officer post will be filled following normal HR procedures. A job description for the position of Service Development Policy Officer was uploaded to the staff teamsite at the start of consultation; however it was removed at the request of the Departmental Steward as it was considered to be out of date. The post holder transferred from Audit with this job description and it has not been updated since. A list of current duties undertaken by the post holder was provided during consultation.

### **At risk letters**

- 2.17 At the start of the redundancy consultation, all members of staff in Corporate Property Services were issued with letters explaining that they were at risk of redundancy. This included a number of staff members that, according to the Director of Place's report to Cabinet dated 11/04/16, were out of scope of the proposals.
- 2.18 When a member of staff is served with an *at risk letter*, it seriously undermines their ability to borrow money, take out loans or a mortgage, etc. it is therefore very important that the Council issues *at risk letters* to the correct group of people.
- 2.19 In this review, we believe that the Council was incorrect to issue *at risk letters* to those members of staff in the Estates section, which are to be part of Phase 2 of the CPS

review. Management have since confirmed that the *at risk letters* will be withdrawn as soon as possible.

- 2.20 Once Phase 2 begins the *at risk letters* will be received, which will mean that some of our members will have been at risk of redundancy for a minimum period of 5 months. Such a situation could be avoidable if management met with the trade unions in advance of reviews to informally agree which members of staff should be put at risk of redundancy.

**Management's Response:**

Staff in Estates have been placed at risk as per council policy in the event of any changes that are made as a result of consultation which may directly impact on their position. The trade unions' comments in relation to the groups of staff placed at risk and the difficulties faced by staff affected are noted.

**Implementation timetable/redundancy notices/Agency staff**

- 2.21 As part of the proposals a number of staff members will be granted their requests to leave on VER/VS. At the final meeting that we attended with management on 21<sup>st</sup> July 2016, we requested more detail as to how implementation of the review will work in practice. With regards the Agency Staff that are currently working in the service, we have previously requested precise details as to the timescales and practicalities of letting these workers leave the Council. However, such details have not been forthcoming.
- 2.22 The Director has advised UNISON and GMB that he will begin implementation after the final structure/proposals have been agreed by the Cabinet on 15<sup>th</sup> August 2016. The newly appointed Head of Service (Grade 14) will also have input into the review implementation and recruitment of staff to new posts in the structure.
- 2.23 We understand that all staff cannot be given the same leaving dates, as the needs of the service would not allow it. Furthermore, some of those members of staff that have applied for VER will not be 55 until 2017.
- 2.24 The Council is reminded of its statutory duty to serve notice on all members of staff, other than those that will be directly slotted-in to their existing post on the new structure.
- 2.25 There is some confusion as to how this implementation will work in practice, particularly with the impact that people leaving will have on the workloads of those left behind. **UNISON and GMB therefore require more precise details and a timetable for implementation of the proposals. We wish to be consulted on such details and the phasing of the implementation as it develops.**

**Management's Response:**

With regards to agency staff, Management gave a commitment to the TUs that agency contracts will be terminated when the new structure is fully operational. There will be a transitional period where knowledge and skill sharing is essential. The length of this period is unknown, however Management envisage this to be between 12 – 18 months after the politically approved implementation date. Implementation of the structure will commence in September 2016, with confirmation of slot-in positions, recruitment to head of service post and ringfenced selection to Service Manager, Team Leader and Asset Manager posts. It is anticipated that notices of redundancy will not be issued until late December 2016. With regards to the TUs question 2.24, the Council is aware of its responsibilities with regard to notices of redundancy.

## Future service delivery

- 2.26 Throughout consultation our members have made clear to us that they fear that management's proposals are not "fit for purpose" and could put at jeopardy the future of the service as an "in-house" provider. For example, our members believe that there are not enough resources in the proposed structure to undertake mechanical and electrical engineering services because there is only one Mechanical and Electrical Officer proposed.
- 2.27 For this reason, as part of our members' dispute UNISON and GMB requested that a presentation be given by the Director of Place to properly explain the rationale and how the model of working will actually work.
- 2.28 This presentation was given to all staff on Friday 24<sup>th</sup> June by the Assistant Director and Special Projects Co-Ordinator. However, our members remain unconvinced that the proposals and management's proposed structure will be "fit for purpose".
- 2.29 As explained in paragraphs 2.1 to 2.6 above, our members do not believe that the Cease and Diminish list that has been provided by management properly demonstrates that the equivalent amount of work will stop when colleagues leave the service.
- 2.30 UNISON and GMB are deeply concerned about the damaging impact of service and staffing cuts on those members of staff that remain working for the Council but with ever increasing workloads, pressure and stress.
- 2.31 **UNISON and GMB wish our members' concerns to be noted for the record.**

### Management's Response:

Management has noted TU members' concerns. Management states that the requirement to find extensive cuts around revenue budgets has resulted in the need to carry out a wider service redesign. As such, many of the current roles have been entirely re-designed into new and very different roles from those currently undertaken by the staff. The proposed structure aims to foster a more holistic approach to property management, with a greater reliance on technology and multi-skilling; moving away from old operating models and silos, thus reducing duplication and inefficient work practices. In addition, income levels within the Service have reduced from £1,613,018 in 2013/14 to £484,735 in 2015/16. Clearly an extensive redesign of the service is required in supporting income generation and growth, something that has reduced by an average of 30% from 2013/14 to 2015/16. The Council's assets have reduced by approximately 5% over recent years, therefore resulting in a correlated reduction in the amount of asset management the service is currently required to provide. Since 2010, there has been £16m of investment into key buildings to ensure that the Council has more sustainable, fit for purpose assets through better infrastructure, resulting in a reduced facilities management support function. The Service has seen a beneficial change in the use and implementation of technology to deliver functions and activities, which has resulted in an improved service.

### Post-implementation evaluation

- 2.32 Given the number of staff involved and the significant changes proposed to frontline service delivery, **UNISON and GMB formally propose that a post implementation evaluation is carried out twelve months after the implementation of the structure, with a report being presented to the DJCC and relevant Cabinet members.**

### Management's Response:

Management agrees to a review 12 months after implementation of the structure.

## **TRADE UNIONS RESPONSE - APPENDIX 1 – NOTE PRODUCED FOR BOROUGH TREASURER AND HEAD OF HR**

### **Introduction**

As you are aware, the review of the Corporate Property Service has encountered some obstacles which both Unison and GMB unions would like to attempt to find a solution to.

The difficulties are centred around the headings detailed below, however are not confined to these issues, as there are also some additional concerns which have been highlighted to you in an email from Bernie Gallagher.

Unison and GMB both felt that we were unable to proceed with the consultation until the information below was produced, as its omission meant that some of the very detail our members required to inform their decision of whether the proposals were viable, was missing.

Essentially we are looking to assess the level of work which will remain once the new structure is in place and ascertain whether or not there is enough capacity in the remaining posts to complete this work.

Despite repeated requests we still have not been provided with a tangible list of duties which will either cease or diminish once the new proposals are implemented and the proposed disestablished posts are removed from the structure.

It is insufficient to use statements such as “reduced workload due to budget cuts and reduced property portfolio has led to less resource needed to deliver this service”, as this does not give the level of detail needed to determine which work will be required going forward and which will no longer be completed or will be performed differently.

Compiling a list of remaining duties should not be too onerous as it should be a case of going through the duties detailed on the job description and stating which will no longer be performed and why.

We are hopeful that on receipt of the following information we will be in a position to consult fully with our members and this will enable us to re-start the consultation process.

### **Cease and Diminish**

It is proposed to reduce the overall establishment by 26.56 Full Time Equivalents (FTEs). This number comprises 10.76 vacancies, 3 proposed VER/VS and the transfer of 6.95 posts from the CPS Help Desk and other support functions that are currently part of CPS' structure. There is a potential for compulsory redundancies amongst the remaining posts, albeit there have been expressions of interest for VER/VS from the group of affected workers.

The Cease and Diminish list of the 19<sup>th</sup> May 2016 includes a number of the vacant posts. Management have stated that a number of these are “long term vacancies”, although we would dispute that a post being vacant since October 2010, for example, is vacant. A number of the vacancies are being covered by acting-up arrangements and/or agency workers: it is unclear from this Cease and Diminish list as to which of these duties will continue and what will cease in the new structure.

The duties of three vacant posts (Operational Facilities Manager, Projects Manager and Statutory Compliance and Records Manager) are proposed to be amalgamated into the proposed Service Manager post (x 2). It should be noted that 11 staff are ring-fenced to these two posts and there are real concerns about capacity in the new structure.

After much pressing and requests from the joint-TUs, a *rationale* was produced by management to try to explain which work from 11 FTEs will reduce when 6 posts go forward in the new structure for the Project Management part of the service (refer to Tables 11 and 12 of the Director's Report to Cabinet dated 11/04/16). Management have told us that "current duties within the ring-fenced roles will not cease but are amalgamated into the proposed roles in the new structure. The new structure will move away from silo working and individual disciplines". How can the posts be redundant when the current duties will not cease?

The rationale provided by management still fails to detail exactly where the work is going with the people that will be leaving the organisation (either through VER/VS or redundancy). The rationale includes vague statements such as: "since 2010, there has been £16m of investment into key buildings to ensure that the Council has more sustainable, fit for purpose assets through better infrastructure, resulting in a reduced facilities management support function." Nowhere in this statement is an idea of which work is no longer needed as a result of the investment: what work was done before and what (diminished) work is now required.

### **Agency workers**

Five agency workers have been in the service for some time, some for as long as 4 years.

At the consultation meeting on the 17<sup>th</sup> May, the joint-TUs requested Cease and Diminish information for these agency workers. We have also requested details of the timescales for letting the agency workers go and how this will work in practice once the proposed structure are to be implemented.

*(NB. When the TUs formally raise issues and proposals at the formal consultations meeting, the Q&A Log does not reflect this. Instead the TUs have to send an email after the meetings to be added to the Q&A Log. Any formal issues and proposals that are raised at a formal consultation meeting should be recorded.)*

Our members have advised us that the CAD Technician agency worker is currently doing work that is income generating and, as far as they are aware, is cost neutral. Furthermore, the rest of the section uses the skills and knowledge of the CAD technician. It therefore doesn't make any business sense to delete this post; particularly as the budget for disability works (a large part of the CAD technician's role) is increasing. If management intend to keep the post then it could be filled by a permanent member of staff and the agency worker released.

### **Rationale/Detail of the proposed service after implementation**

Our members are very concerned that they have not seen enough detail to explain how this service will actually function with the new structure after implementation. It appears to us that the proposals have been partly designed around which members of staff have applied for VER/VS rather than on what management actually want the service to look like in the future.

We have requested at formal consultation meetings that a presentation is given to all staff by Stephen Young to properly explain the rationale and how the model of working will actually work. Most of our members are open-minded to a new way of working but it needs explanation and more "meat on the bone".

We wish to re-iterate our request for such a presentation and explanation.

### **Transfer of CPS Help Desk**

At the start of the review, even though the individual staff were put at risk, it was understood that the Help Desk were out of scope of this review.

However, it became apparent that management were proposing to physically relocate the Help Desk but could not provide information as to what this would entail. Any physical change to the conditions is covered by collective bargaining and these posts should therefore form part of this consultation.

Management's latest position is as follows: "the proposal is to transfer the budget and line management to the Chief Executive's Department and may involve a change in physical location of the CPS Helpdesk. There are no proposals at this moment in time to change working conditions and practices. If there is a requirement to review the CPS helpdesk in the future, it will be part of a wider Contact Centre service-led review, where staff and Trade Unions will be consulted as per the agreed corporate process."

A change in physical location is by its very nature a change to working conditions and practices, not just for the staff that may move but staff in the rest of the division that they interact with on a daily basis.

Our members have advised that it makes no sense to physically relocate the Help Desk given the daily interactions between them and other parts of the service. Management have now accepted that the Help Desk will continue to do exactly the same work and duties that they currently do, so why physically move them?

At the last consultation meeting that we attended on Tuesday 17th May, UNISON and GMB formally proposed that the CPS Helpdesk remains in their current location on the 3rd floor - working alongside CPS colleagues - until such a time as the outcome of the Phase 2 Admin Review is known. We reiterate that formal proposal.

### **Finances**

As the joint-TUs have gone into dispute we have not attended consultation meetings as we maintain that our reasons for going into dispute need addressing before returning to consultation meetings. Before our members went into dispute, we attended a meeting with the policy accountants to discuss the financial information provided for the review.

We need an explanation as to why posts are proposed to be removed from CPS' structure to cover proposed new costs falling on the service in relation to Castle Hill (£135k) and Property Maintenance (Backlog) (£99,799). Refer to Table 1b of the Director's Report to Cabinet Dated 11/04/16. Is there no corporate funding available (e.g. Transformation funding) to cover these proposed additional costs?

Whilst we accept that this did not form part of our dispute, it is something that would have been raised during formal consultation meetings.

## **TRADE UNIONS RESPONSE APPENDIX 2 – COLLECTIVE DISPUTE (LODGED 23<sup>RD</sup> MAY 2016)**

### **Background**

On 11<sup>th</sup> April 2016 the Cabinet agreed for consultation a report from the Director of Place for a Corporate Property Services Review. The review proposes a budget reduction of £500,000, principally by reducing the staff establishment by 26.56 Full Time Equivalents (FTEs) from 66.20 FTEs to 39.64 FTEs. With the deletion of vacant posts and the transferring of a number of posts to other Council sections, the proposals mean that there is a potential for 5 workers to be made compulsorily redundant. A copy of the Council's proposals is attached at *Appendix 1*.

Consultation on the proposals started on the 12<sup>th</sup> April 2016 and the joint-Trades Unions first met with management on Tuesday 26<sup>th</sup> April 2016. Since then the joint-TUs have met on a weekly basis as part of the formal consultation process. However, at the start of the consultation period management did not make available a full and exhaustive Cease and Diminish list for all the posts that are to be made redundant as part of these proposals. Furthermore, existing Job Descriptions were also not made available for scrutiny.

Our members have raised a number of questions, which have been responded to by management although not always in a timely manner. A copy of the latest (at the time of writing) Q&A Log is attached at *Appendix 2*.

The main areas of concern for UNISON and GMB are as follows:

- The service review is flawed in that it is based on which members of staff have applied for Voluntary Early Retirement (VER) or Voluntary Severance (VS) rather than on management's vision is for service delivery and functions of CPS. UNISON and GMB contend that the proposals are not based on the needs of the service and our members are yet to see evidence that the Council's proposals are "fit for purpose".
- The Council's review document states that the CPS Helpdesk (6.95 FTE) is out of scope of this review as these posts were included as part of the Phase 1 Administration review. However, during consultation meetings with management it became apparent that there are proposals to physically relocate the CPS Helpdesk, which will have implications in terms of reporting procedures, day-to-day working with CPS colleagues, etc. These additional proposals are not acceptable as these staff are out of scope of this restructure and any proposed changes to their current working practices should be encompassed in Phase 2 of the Admin Review.
- A full and exhaustive Cease and Diminish list of all the redundant posts – together with agency workers' posts – has not been produced by management. The Cease and Diminish list received so far, together with the rationale for the service review, is attached at *Appendix 3*. This list is wholly inadequate in that it consists of a rationale for reducing tasks rather than a comprehensive list of specific duties and responsibilities which will cease or diminish.

The Employment Rights Act 1996, section 139, states that a genuine redundancy situation only arises in the following situations:

- The employer has ceased, or intends to cease, to carry on the business for the purposes of which, or in the place where, the employee was so employed; or
- The requirements of the business for the employees to carry out work of a particular kind, in the place where they were so employed, has ceased or diminished or are expected to cease or diminish.

It is clear, in law, that whenever posts are deleted and made redundant from a structure – regardless of whether the former post holders have left employment through voluntary or compulsory means – the employer has to demonstrate that the work relating to those posts is ceasing or diminishing.

Despite a number of discussions during consultation meetings, management have still not explained to UNISON and GMB what work will cease and diminish to account for the proposed deletion of jobs from the service.

During consultation regarding the 2015-2018 Budget Update and Strategic Approach, the joint-TUs highlighted the need for comprehensive cease and diminish proposals where the employer is proposing to delete posts.

In our response we informed the Authority that, if the employer could not clearly demonstrate which work would cease and diminish, we would not rule out consulting our members to commence a dispute. The employer replied by acknowledging the importance of being clear on "cease and diminish". A copy of the joint-TUs' response, together with the Council's response, is attached at *Appendix 4*.

The joint-TUs believe that we have exhausted the internal industrial relations machinery before lodging this collective dispute. We have attended and engaged with management at four formal consultation meetings. We have also attempted to resolve the reasons for this dispute by referring the matter to the Head of HR & the Borough Treasurer, on 13<sup>th</sup> May 2016. A copy of our email and the response received is attached at *Appendix 5*.

## Resolution

1. That all threats of compulsory redundancies are withdrawn.
2. That the formal consultation is immediately suspended. Consultation should only restart by agreement with Unison and GMB.
3. That management provides full and exhaustive proposals for work that will cease and diminish to account for the overall reduction in the establishment by 26.56 FTE. Management must then enter meaningful consultation and negotiation over these proposals.
4. That management withdraws all plans to physically relocate the CPS Helpdesk.

**Bernadette Gallagher**  
**UNISON**

**Matt Kilsby**  
**UNISON**

**Cecilia Costello**  
**UNISON**  
**23<sup>rd</sup> May 2016**

**Stephen Dickinson**  
**GMB**

**Alan Flatley**  
**GMB**

# Management's Response to the Trade Unions' Collective Dispute

Date: 5<sup>th</sup> July 2016

Ref:



## Department of Place

Bolton Town Hall

Bolton

BL1 1RU

Tel:

Unison  
Bolton Metro Branch  
2<sup>nd</sup> Floor  
The Hub  
Bold Street  
Bolton

[www.bolton.gov.uk](http://www.bolton.gov.uk)

Dear XXXX (redacted),

Thank you for your letter dated 29<sup>th</sup> June 2016, regarding the Phase 1 Corporate Property Services Review.

As you are aware, Management, at the request of the Trade Unions and staff, organised and delivered a presentation on 24<sup>th</sup> June 2016, which focused on the rationale behind the proposed restructure and detailed current and future external factors facing the Service. The information within the presentation was instrumental during the scoping phase of the review and has heavily influenced the proposed structure. I reiterate that the requirement to find extensive savings around revenue budgets and major external factors which are out of our control, have resulted in the need to carry out a wider service redesign. As such, many of the current roles have been entirely reshaped into new and very different roles from those currently undertaken by the staff. The proposed structure aims to foster a more holistic approach to property management, with a greater reliance on technology and multi-skilling; moving away from old operating models and silos, therefore reducing duplication and inefficient work practices. The proposed structure is designed to ensure that the Service meets future demands and can adapt to national and regional mandatory delivery changes. It has always been my intention, as part of this review, to retain this part of the service in-house. I am therefore perplexed when you state that your members believe that the proposals will lead to privatisation of the Service.

I am disappointed that the requested actions asked of us during the consultation process have not resolved the issues raised. I have tried to accommodate all requests from staff and the Trade Unions during the consultation process, including weekly meetings with the trade unions, maintenance of the question and response log, which has been regularly shared with the trade unions, distribution of a detailed cease and diminish list, the preparation and delivery of an additional presentation and the attendance of the Borough Treasurer at the consultation meeting on 14<sup>th</sup> June 2016, to assist with the review process, as recommended at the Corporate Employer Relations meeting on 7<sup>th</sup> June 2016.

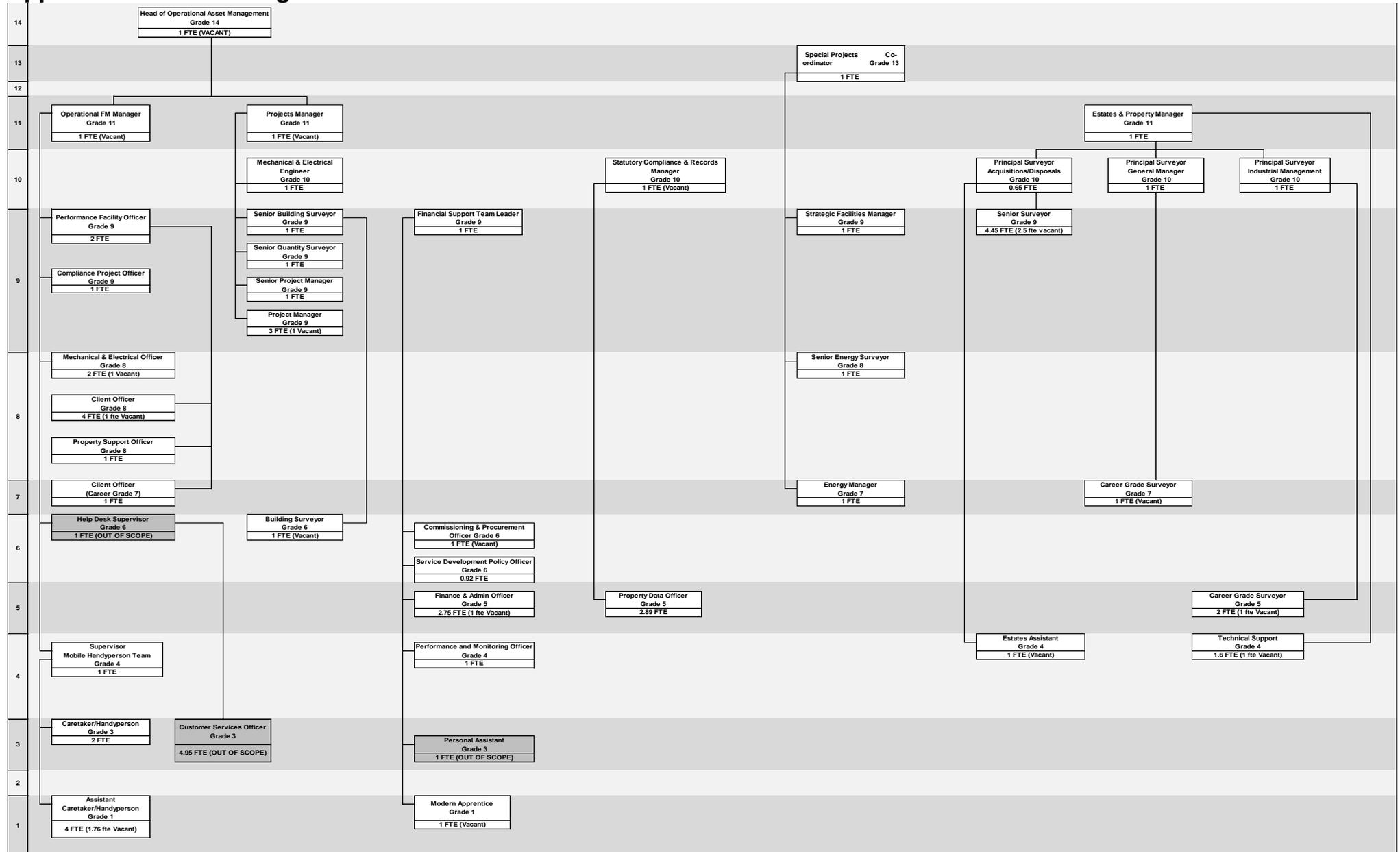
To conclude, the Council's view is that the issues you have raised in your letter dated 29<sup>th</sup> June 2016 are premature, as formal consultation on this review only ended on 4<sup>th</sup> July 2016. The final proposals and staffing structure have therefore not been shared with staff and Trade Unions. I will be submitting the final proposals to Cabinet on 15<sup>th</sup> August 2016. Should you wish to submit a formal response, please forward this to me by Friday 15<sup>th</sup> July 2016.

Yours sincerely

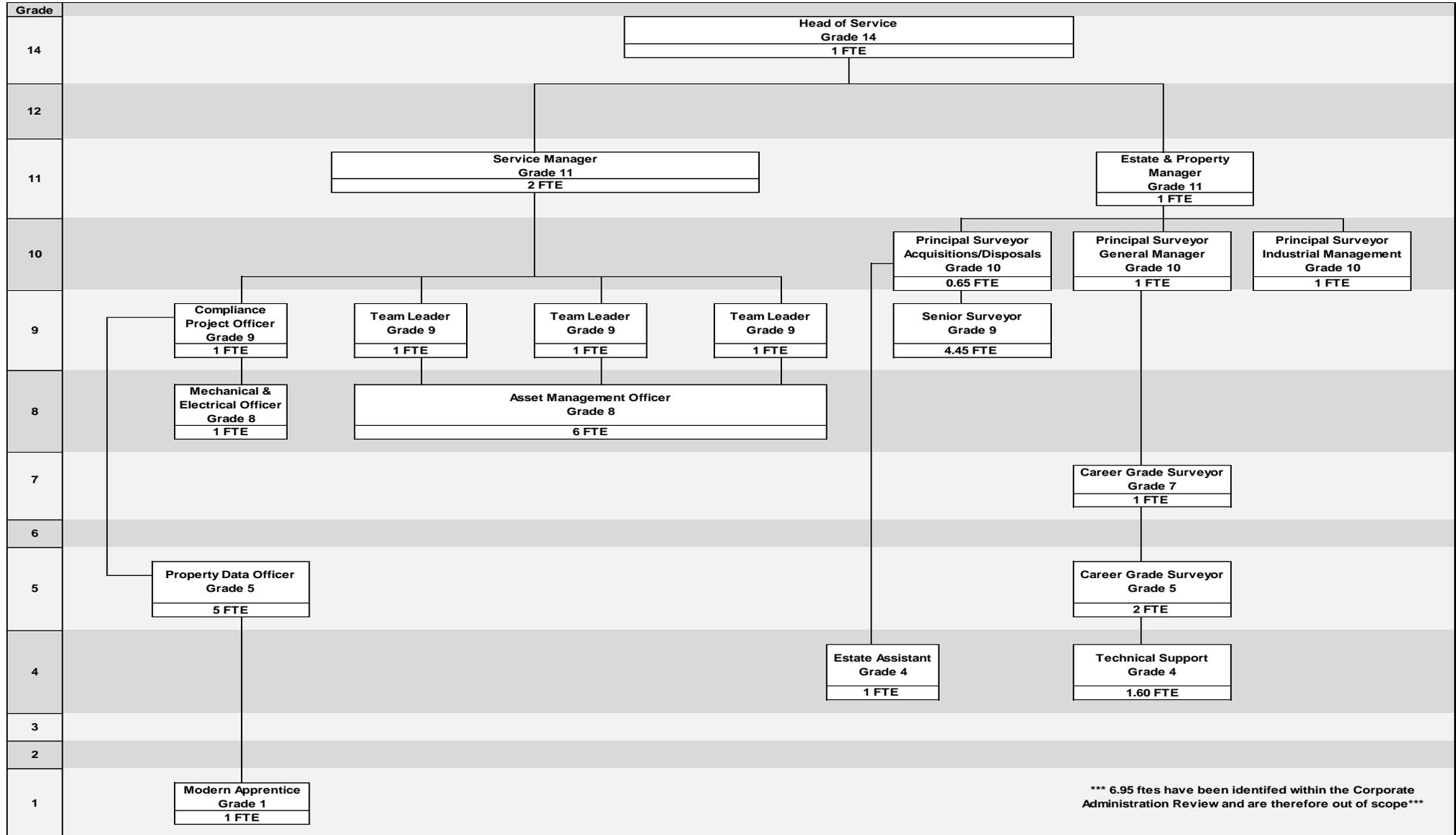
Stephen Young  
Director of Place

CC XXX (redacted) - GMB

# Appendix 3 - Current Organisational Structure



# Appendix 4 - Final Organisational Structure



## Equality Impact Assessment Part 1: Screening Form

|                                                               |
|---------------------------------------------------------------|
| <b>Title of report or proposal:</b>                           |
| Corporate Property Services Review – Post Consultation Report |

|                           |                             |
|---------------------------|-----------------------------|
| <b>Department:</b>        | Department of Place         |
| <b>Section/SIAP unit:</b> | Corporate Property Services |
| <b>Date:</b>              | 23.06.16                    |

This report is for decision and is therefore subject to an Equality Impact Assessment. The following questions have been completed to ensure that this proposal, procedure or working practice does not discriminate against any particular social group. Details of the outcome of the Equality Impact Assessment have also been included in the main body of the report.

### Equality Impact Assessment Questions

#### 1. Describe in summary the aims, objectives and purpose of the proposal, including desired outcomes:

At its meeting on the 10<sup>th</sup> November 2014, the Council's Cabinet approved the start of the consultation process on a programme of savings covering the years 2015/16 and 2016/17. The Council subsequently approved savings options in February 2015, following the December 2014 Local Government Settlement, in order to meet an increased savings target of £43.4m for the 2015/17 period. This report sets out the results of the formal consultation process on Phase 1 of a two-phased approach to achieve £613,000 savings through a review of Corporate Property Services (CPS), and contains the final proposals in response. Phase 1 savings amount to £454,503. The proposals indicate a potential overall reduction in staff establishment by 25.56 FTEs from 66.20 FTEs to 40.64 FTEs. In addition, it is proposed to create a strategic maintenance budget of £99,799, to tackle backlog property maintenance, in order to deliver the Council's strategy for its property portfolio, with a view to ensuring that it is fit for purpose. It is anticipated that the proposals detailed in this report will be implemented from 1<sup>st</sup> September 2016 should they be approved.

It is anticipated that the proposals detailed in this report will be implemented from 1<sup>st</sup> September 2016 should they be approved.

#### 2. Who are the main stakeholders in relation to the proposal?

Staff  
Trade Unions  
Elected Members

### 3. In summary, what are the anticipated (positive or negative) impacts of the proposal?

The following positive impacts are anticipated through the proposals within this report:

- achieve the £313k savings required during 2015/17
- mitigate the income generation pressures of £300k
- maximise the income from Council land & property
- improve service quality to Council departments, customers and clients
- enable new ways of working with other organisations in both the public and private sectors
- speed up regeneration plans & projects
- ensure that the Council's statutory duties relating to property and facilities management are met
- build in some flexibility to revisit the Service in the wake of further income reduction
- move to a single operation under one Head of Service

The following negative impact is anticipated:

- Management acknowledge that there will be a significant amount of change in terms of work type and team culture and staff will require time and support to adjust.
- There is the potential for staff to be in a redundancy situation if VER/VS applications are not taken up or if recruitment into senior posts is unsuccessful.

This impact is mitigated by:

- Senior management has been briefed on proposals and will work with the Organisational Development Team to identify appropriate staff training & support
- Staff in a redundancy situation will be managed and supported in line with the Council's restructure, redundancy and redeployment policy framework – to reiterate, designed not to discriminate against any group of people.

Anticipated changes are service wide. As such, they would affect staff equally, regardless of their diversity group or where they live, work or study in Bolton. They have therefore been categorised as having no differential impact.

The proposals would not result in a differential change to the services provided to external customers; as such there is no impact to consider for this group.

4. With regard to the stakeholders identified above and the diversity groups set out below:

|                                               | <b>Is there any potential for (positive or negative) differential impact?</b> | <b>Could this lead to adverse impact and if so what?</b>                           | <b>Can this adverse impact be justified on the grounds of promoting equality of opportunity for one group, or for any other reason?</b> | <b>Please detail what measures or changes you will put in place to remedy any identified adverse impact</b> |
|-----------------------------------------------|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Race</b>                                   | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Religion</b>                               | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Disability</b>                             | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Gender (including gender reassignment)</b> | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Age</b>                                    | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |

|                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                    |                |                |
|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------|----------------|
| <b>Sexuality</b>                                           | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Caring status (including pregnancy &amp; maternity)</b> | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Marriage and civil partnership</b>                      | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Socio-economic</b>                                      | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Other comments or issues</b>                            | <p>Relevant feedback (key stakeholders detailed in Section 2) from consultation has been considered to inform the final proposals.</p> <p>The proposals will have an impact on staff. The proposals as set out in this report for consultation indicate a potential overall reduction in the staff establishment by 25.56 FTEs.</p> <p>Whilst income opportunities have been helpful in minimising the impact on staff, the delivery of savings of this scale have been impossible without a fundamental service restructure and revised service model. If approved:</p> <ul style="list-style-type: none"> <li>• Posts which are currently held vacant would be dis-established.</li> <li>• On approval of VER/VS requests, posts would be dis-established.</li> <li>• New posts will be established</li> </ul> <p>To protect incumbent post holders, as far as possible, applications for VER have been accepted, in addition to deleting vacant posts. Decisions around accepting applications have been based on the need to protect service delivery levels when</p> |                                                                                    |                |                |

|                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                         | <p>weighed against the need to protect staff employment. All new posts have been evaluated through the Council's pay and grading process in line with HR policy. Any redundancies resulting from these proposals will comply with the Council's Human Resources procedures which are designed to not discriminate against any group of people. Staff in a redundancy situation will be managed and supported in line with the Council's restructure, redundancy and redeployment policy framework – to reiterate, designed to not discriminate against any group of people.</p> <p>Any reduction in the workforce will lead to a potential reduction in its diversification, however this will be through following the appropriate procedures and not the discrimination of particular members of staff based on any other criteria except that stated in the Council's restructure, redundancy and redeployment policy framework.</p> |
| <p><b>Please provide a list of the evidence used to inform this EIA, such as the results of consultation, service take-up, service monitoring, surveys, stakeholder comments and complaints where appropriate.</b></p> <p><b>If you have undertaken consultation as part of the proposal, the consultation manager will upload it on to the corporate database.</b></p> | <p>Current workforce structure</p> <p>Financial information</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

**5a Are there any gaps in your evidence or conclusions that make it difficult for you to quantify the potential adverse impact?**

No

**5b If so, please explain how you will explore the proposal in greater depth or please explain why no further action is required at this time.**

N/A

**You may wish to consider undertaking secondary data analysis, further consultation or research or investigating best practice. If you are planning to undertake further consultation or research as a result of this EIA, please contact the Principal Consultation and Research Officer on ext. 2012.**

**This EIA form and report has been checked and countersigned by the Departmental Equalities Officer before proceeding to Executive Member(s)**

Please confirm the outcome of this EIA:

|                                                                                                                                                    |                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| No major impact identified, therefore no major changes required – proceed                                                                          | <input checked="" type="checkbox"/> |
| Adjustments to remove barriers / promote equality (mitigate impact) have been identified – proceed                                                 | <input type="checkbox"/>            |
| Continue despite having identified potential for adverse impact/missed opportunities for promoting equality – this requires a strong justification | <input type="checkbox"/>            |
| Stop and rethink - the EIA identifies actual or potential unlawful discrimination                                                                  | <input type="checkbox"/>            |

**Report Officer**

Name: Stephen Young  
Signature: SY  
Date and Contact No: 23.06.16

**Departmental Equalities Lead Officer**

Name: Tammy Tatman  
Signature: TT  
Date and Contact No: 23.06.16

**Part 2: Consultation Form  
(To be completed where consultation has been undertaken)**

This report is for decision and is therefore subject to an Equality Impact Assessment. The proposal was also subject to consultation and this Equality Impact Assessment (Consultation Form) provides details of the consultation results. The following questions have been completed to ensure that this proposal, procedure or working practice does not discriminate against any particular social group. This has been ensured by undertaking consultation. Details of the outcome of the consultation have also been included in the main body of the report.

**This form asks you to provide details of all the consultation undertaken specific to the proposal you are making, either prior to the EIA or as part of it and the results of this.**

**Consultation with staff**

**Please summarise the consultation undertaken with staff and their Trade Unions regarding this proposal.**

On 12<sup>th</sup> April 2016, after political approval of the consultation report on 11<sup>th</sup> April 2016, “at risk” letters were issued to affected staff. Formal consultation on the proposals expired on 4<sup>th</sup> July 2016.

Key elements of the formal consultation have included:

Staff

- A formal briefing session and presentation for all staff on 12th April 2016
- Maintenance of a staff teamsite using SharePoint, for staff to access information and a dedicated email address to contact the project team;
- Holding individual meetings with members of staff, attended by HR and/or trade unions representatives where requested;

Trade Unions

- Meetings with trade unions and a Question and Response Log completed and shared with trade unions;
- Responding to specific requests for information from the trade unions;
- Access to all job descriptions, person specifications and job evaluation information;

**Please summarise the results of this consultation, including key issues arising and any changes being made to the proposal as a result of the consultation.**

Staff

A Question & Answer Log has been maintained for issues raised directly from staff. The main issues raised are:

- Clarification on the Helpdesk Supervisor post and current honoraria arrangements
- Clarification & changes on the refreshed Data Property Officer job description and person specification

## Trade Unions

The formal Trade Unions' responses to the proposals are set out in full at Appendix 2, along with the corresponding management responses. In summary, the main issues raised by the Trade Unions are:

- Request to transfer the Financial Support Team Leader post to the Finance & Business Development Division
- Clarification and further information requested on the duties which are ceasing and diminishing
- Request to delay the transfer of the Helpdesk function, pending further details

A summary of the issues raised by both staff and trade unions and the associated Management response can be found at Appendix 1. A copy of the full staff and trade unions' consultation log and associated documentation are available on request.

**Please summarise the consultation undertaken with customers and other stakeholders regarding this proposal (refer back to the stakeholders identified in your screening form).**

Due to the nature of the proposals, it was not necessary to consult with stakeholders

**Please summarise the results of this consultation, including key issues arising and any changes being made to the proposal as a result of the consultation.**

Following consultation, Management considered the points made and have agreed the following amendments within the final proposals:

- Amendments to the Data Property Officer job description
- Transfer of the Financial Support Team Leader post to the Finance & Business Development Division

These changes have resulted in a reduction in the overall efficiencies savings for Phase 1. The total efficiency savings for Phase 1 is £454,503.

With regard to the stakeholders identified above and the diversity groups set out below:

|                                               | <b>Is there any potential for (positive or negative) differential impact?</b> | <b>Could this lead to adverse impact and if so what?</b>                           | <b>Can this adverse impact be justified on the grounds of promoting equality of opportunity for one group, or for any other reason?</b> | <b>Please detail what measures or changes you will put in place to remedy any identified adverse impact</b> |
|-----------------------------------------------|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Race</b>                                   | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Religion</b>                               | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Disability</b>                             | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Gender (including gender reassignment)</b> | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |
| <b>Age</b>                                    | No differential impact is anticipated at this stage.                          | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable                                                                                                                          | Not Applicable                                                                                              |

|                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                    |                |                |
|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------|----------------|
| <b>Sexuality</b>                                           | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Caring status (including pregnancy &amp; maternity)</b> | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Marriage and civil partnership</b>                      | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Socio-economic</b>                                      | No differential impact is anticipated at this stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | It is not anticipated that there would be an impact as a result of these proposals | Not Applicable | Not Applicable |
| <b>Other comments or issues</b>                            | <p>Relevant feedback (key stakeholders detailed in Section 2) from consultation has been considered to inform the final proposals.</p> <p>The proposals will have an impact on staff. The proposals as set out in this report for consultation indicate a potential overall reduction in the staff establishment by 25.56 FTEs.</p> <p>Whilst income opportunities have been helpful in minimising the impact on staff, the delivery of savings of this scale have been impossible without a fundamental service restructure and revised service model. If approved:</p> <ul style="list-style-type: none"> <li>• Posts which are currently held vacant would be dis-established.</li> <li>• On approval of VER/VS requests, posts would be dis-established.</li> <li>• New posts will be established</li> </ul> <p>To protect incumbent post holders, as far as possible, applications for VER have been accepted, in addition to deleting vacant posts. Decisions around accepting applications have been based on the need to protect service delivery levels when</p> |                                                                                    |                |                |

|                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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Please confirm the outcome of this EIA:

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