

Business Planning – Structural Revision (Procedure)

This document will enable Business Planning – Structural Revisions in Professional Services areas. It deals with small scale or localised restructures involving, one post, a team, or a section. All revisions will be led by a Director or Associate Director of Professional Services or a Head of College or Associate Head of College - Operations

These guidelines refer to local, structural revisions in Professional Services areas due to normal business considerations. Alternative processes may be applied if and when necessitated by external factors, such as marked decrease in funding.

Context

This procedure should be underpinned by the strategic aims and needs of the University and is aligned to the annual Business Planning and Strategic Recruitment processes. However, it is recognised that, in *exceptional circumstances*, PSUs/College may need to implement a localised structural review outside of the usual Business planning period, to meet changing priorities.

The route for attaining any professional services role is through application and appointment, with fair selection from the widest possible talent pool.

Step 1 – Review the Professional Services Structure

Directors/ Associate Directors /Heads of Colleges / Associate Heads of College - Operations are expected to keep their professional services structures under annual review taking into account changing patterns of demand, changing working methods, and available resources. Where reviews indicate that changes to structure would be appropriate and affordable within existing allocated resources, Directors and Associate Heads of Colleges will document the rationale for change and brief the Registrar.

Step 2 – Create the Business Case

Where the proposed changes are agreed, with support from the HR Business Partner, the Directors and Associate Heads of Colleges will document the existing structure and the proposed new structure; revise Job Descriptions and Person Specifications, confirm the grade and set out the process for selection and appointment.

The widest possible candidate pool must be identified, and agreed with the relevant HR Business Partner, carefully considering the resources available as well as the repercussive implication and the principles outlined in this document.

Staff who are absent due to sickness or maternity/adoption/parental leave must be considered and, if applicable, included in the process.

Once the proposed candidate pool has been identified, the lead manager should consult with staff to ensure the pool is appropriate (see Step 3 below).

Note that the outcome may result in subsequent vacancies arising, so this process may need to be repeated.

Step 3 – Consult with Staff

Meaningful and timely consultation with staff potentially affected by the changes should take place, outlining the proposals, the rationale for the proposed changes and the process to be followed, with timescales and job details.

Such consultation should ensure all staff potentially affected by the proposed changes are informed about and have the opportunity to comment on the proposed changes

Consultation should include information sharing via appropriate communications and meetings with the affected staff group, including the offer of one-to-one meetings. Consideration should also be given to the utilisation of existing staff networks/fora.

Support and advice on the restructure process will be available to members of staff via their Line Manager, Trades Union representatives (for members of unions) and HR representatives.

Step 4 - implement

Following consultation, with support from the HR Business Partner, Directors and Associate Heads of Colleges will finalise the proposed new structure; revise JDs and PSs confirm the grade and proceed to resourcing the structure.

Step 5 – The Recruitment, Selection and Appointment Process

1. The final job description(s) including the relevant values, and appropriate person specification(s) must be agreed with the HR Business Partner.
2. Vacancy details are advertised within the identified pool. The normal University recruitment system should be used to create and manage the vacancy.
3. Relevant links are circulated to the identified pool.
4. Applications are received by the stated closing date and the candidate packs passed to the recruiting manager.
5. A fair and transparent selection process takes place.
 - If there is only one application, a **panel conversation** will take place with the Head of Section and HR representative, to ensure that the member of staff understands and accepts the revised role description and fully recognises and adopts the professional services / leadership values.
 - If there is more than one applicant, a **competitive interview** scenario will take place to agree the successful candidate, with an appropriate panel.
6. Following either a panel conversation, or a competitive interview, there are two possible outcomes; candidates will be either 'appointed' and will not be subject to a probationary period (unless still subject to a pre-existing probation period), or 'not appointed'.
7. Following the process, the line manager and members of staff appointed to new roles should conduct a Professional Development Review to enable the successful member of staff to succeed in their new role. The PDR objectives should align with the new role and should reflect any development needs of the member of staff arising from changes in role and expectations. Progress against the objectives will be monitored regularly during the year and through the PDR process.

8. An on-going training plan should be developed to provide support for the new member of staff to set them up for success in their new role and to enable the new structure to be embedded. This [form](#) may be helpful to use

Step 6 – Redeployment

The principles state that the Professional Services Organisational Structure process should not result in redundancy.

In the unlikely event of displacement, affected staff will be eligible to apply for vacancies as part of the University's [redeployment](#) pool. If a member of staff is displaced into the redeployment pool, their designated HR Business Partner will work closely with them to source suitable opportunities and provide appropriate support whilst they are undertaking this process.

Step 7 - Post-Implementation

Following implementation of a Professional Services Organisational change, an Equality Impact Assessment will be undertaken by the Recruiting Manager, and any adverse impact shared with the Director of Human Resources.

Individual Issues

Staff should not be expected to consistently or persistently undertake work of a higher grade without due process. In cases where staff have concerns, the University has a number of options available, including informal discussion with Line Manager, informal discussion with HR Business Partner, mediation and grievance.

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