

**Step 1 – PROPOSAL DISCUSSIONS AND CONSIDERATIONS**

- Talent Management** - Email Talent Management to discuss the proposal with an Advisor in the first instance.
- Your Chief Officer** - Speak to your Chief Officer to ensure that they support the proposal.
- Finance Partner** - Discuss the affordability of the proposal with your Finance Contact (this is critical at an early stage to ensure financial control will be sustained throughout the potential change)
- ECB, Workforce Change, JE ?** - Consider Establishment Control Board deadlines, Workforce Change processes, consultation and Job Evaluation timescales where applicable. If you are not familiar with ECB or WFC processes, please visit the [Workforce Change page](#) for more information. The [Workforce Change](#) or [Talent Management](#) teams can also assist if you have further questions.

Links to information on items 1 and 4 are located in the 'Resources' section at the foot of the People Anytime page.

**Step 2 – INFORMAL CONSULTATION STAGE**

Speak to key stakeholders to gather initial feedback on the proposal. This may include affected employees, Trade Unions, customers etc.

Link to [Trade Union Contacts](#) is also located in the 'Resources' section at the foot of the People Anytime page.

**Step 3 – JOB EVALUATION**

If there are any Job Evaluation implications, complete a **Job Profile** and a **Job Evaluation Questionnaire** and submit to [Talent Management](#) for evaluation.

These templates are found on the [JE page](#) (link also located in the 'Resources' section at the foot of the People Anytime page).

**Step 4 – DRAFT BUSINESS CASE**

Complete the business case template and forward to Talent Management and to your Finance Contact for comment. Please ensure all financial calculations have been checked against current/future year Salary Scales prior to circulation. Consider comments received and update the draft business case as required. Please note, you can make a start on drafting the business case whilst any job evaluation is taking place.

The template document and email address are located in the 'Resources' section at the foot of the People Anytime page.

**Step 5 – FORMAL CONSULTATION**

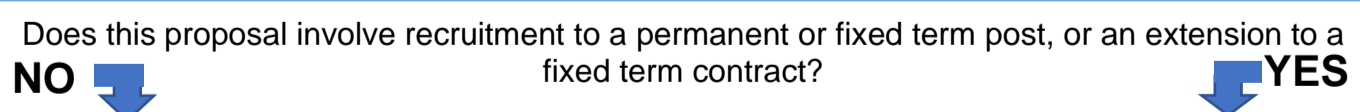
Email the business case to consultees shown below for a **10 working day** formal consultation period:

- Any affected employees**
- Trade Unions** – link to contacts also found in the 'Resources' section at the foot of the People Anytime page
- Isla Newcombe - Chief Officer for the People & Organisation Cluster**
- Jonathan Belford – Chief Officer for the Finance Cluster**
- Legal** (only where applicable)
- Please Cc Talent Management Team** (for ref only – no response required)

At the end of the consultation period, update the business case with any comments received or stating 'No comments received'.

**Step 6 – DELEGATED APPROVAL**

Submit the final business case to your Director / Chief Officer for approval.



**Step 7 – IMPLEMENTATION**

Email the approved business case to [Workforce Change](#) and [Talent Management](#) for the structure change to be implemented. Copy to the Accounting mailbox to ensure any updates required are also processed.

**WORKFORCE CHANGE PROCESS and ESTABLISHMENT CONTROL BOARD**

If the business case involves recruitment to a permanent or fixed term post, or an extension to a fixed term contract, you are also required to **complete a Workforce Change Online Form** and follow the appropriate Workforce Change process to seek approval to implement.

All details of this process and Establishment Control Board dates are found via the Workforce Change link in the 'Resources' section of the People Anytime page.