**ORGANISATIONAL CHANGE TEMPLATE GUIDANCE**

The ‘Proposed Organisational Change – Report to Governing Body’ document (see below) has been developed to provide Headteachers with a standard template to capture the relevant information required to initiate organisational change. The HR Business Partner must be notified at the earliest opportunity if a reduction in staffing is proposed.

The purpose of this template is to ensure that all organisational change and the proposals/options under consideration have been fully considered and will be discussed with our recognised union colleagues. In particular, it is essential that the full impact is known and understood and that if there is a potential impact on staffing, that it is clear that the School has taken all possible action to mitigate against potential redundancies.

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| **Organisational Change Document** | **GUIDANCE NOTE FOR EACH SECTION** |
| **Section 1 – OVERVIEW OF PROPOSED CHANGE** |  |
| Comprehensive overview of the context/current situation and the reasons why organisational change is necessary. | *This section should provide a summary about why the organisational change is necessary and its context: This should include:*   * *Overview / Introduction / school context* * *Vision / mission* * *How will the strategic priorities of the school will be achieved* * *Expected benefits* * *Purpose / summary of change reasons and rationale* * *Anticipated timescales* * *Consider implementation date / prepare timeline* * *Schedule governor meetings for ratification* * *Diarise key dates* |
| **Section 2 - BUDGET** |  |
| Summary of relevant budgetary information | *This section should provide a summary of the key financial information which has contributed to these proposals/options being put forward.*  *Examples of budget pressures to be given e.g. falling pupil roll, reduction in funding / grant withdrawn.*  *Consider whether the school is in deficit situation, if not in deficit what would the school budget look like if structure not implemented including any ear marked funds, any measures / savings from other areas of the school budget considered by the school.*  *Give detail of any savings to be sought from elsewhere in the budget if relevant*  *Any other relevant financial information* |
| **Section 3 – ORGANISATIONAL STRUCTURE** |  |
| Details of any proposed new organisational chart/s. | *If there is a proposed impact on the organisation structure – the school needs to provide details of the proposed new structure/s under consideration and its impact on roles, numbers etc.*  *Current structure and the revised structure proposals would need to be shared, structure charts attached to document* |
| **Section 4 - POTENTIAL OPTIONS** |  |
| Summary of the potential options/proposals under consideration and their expected impact on the school, and potential impacts on other areas within the school. | *This section should provide details on the range of options/proposals being considered, and the expected impact of the proposal on all aspects of the school that the change may affect. Indicate preferred option of headteacher if any.* |
| **Section 5 – STAFFING IMPACT AND REDUNDANCY SELECTION CRITERIA** |  |
| Details of roles identified for potential redundancy and summaries why these roles are at risk:  Number and categories of employees who are expected to be affected – (including status, e.g. agency, supply teachers, casuals).  Total number of staff in each category | *This section should provide a summary of the potential impact on the staffing profile and will provide details of the roles potentially at risk of redundancy and a summary of why these particular roles are at risk.*  *Details of roles that will be deleted and new ones created should be outlined, along with indicative Grades.*  *Draft job descriptions and person specifications should be appended to this document.*  *In addition, details should be given of the proposed redundancy pool and selection criteria that would be used if available or details of timescales for agreement of selection criteria.* |
| **Section 6 – MITIGATING ACTION** |  |
| The school should clarify the proactive measures that have been taken or are being considered to ensure that every effort is being made to avoid redundancies. The list below highlights the measures that have been considered, but is not exhaustive.   * recruitment activity (freeze) * agency/temp usage * use of overtime * natural wastage expected (retirement/vacancies) * flexible working * consider the ending of any fixed term contracts * *voluntary redundancies – can only be sought once governing body has confirmed that Headteacher can progress with consultation on proposed new structure* | *This section should provide a summary of the potential impact the proposals/options may have on the staffing profile and the proactive measures which have actually been taken or have been considered to avoid compulsory redundancies.* |
| **Section 7 – EQUALITIES IMPACT ASSESSMENT** |  |
| There is a requirement for an impact assessment to be submitted with this document. | *The service will need to provide evidence that a formal equalities impact assessment has been completed to ensure that prior consideration has been given to determine whether the proposals have a disproportionate effect on either gender, black and ethnic minority staff, staff with disabilities and staff of different ages.*  *The school to consider the impact of the restructure proposals, and share any data regarding staffing profiles, e.g number of known disabled employees in school, age, gender ethnicity profile, and so on.*  *The school will ensure that the restructure will be managed in a fair and consistent manner, in line with equality legislation. The school will ensure that any selection process will not disadvantage any minority groups. Equal access will be given regarding any voluntary solutions. The school will ensure that the restructure does not have any direct or indirect discriminatory impact* |
| **Section 8 – NEXT STEPS** |  |
| Set out commencement and conclusion of any statutory consultation period. (This will normally be 45 days as redundancies need to be counted across the whole of SCC including all maintained schools).  Possibly set out date final decision to be made. | *This will include –*   * *proposed communications and timeline* * *attach any proposed communication to staff, unions, wider audience and other stakeholders* * *any relevant policies/procedures or links to* * *how can staff feedback* * *details of union colleagues* * *1-1 meetings* |

**PROPOSED ORGANISATIONAL CHANGE**

**REPORT TO GOVERNING BODY**

This report seeks confirmation from the governing body that a restructure of \_\_\_\_\_\_\_ needs to made from <insert date>.

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| 1. Overview |
| Overview of the context/current situation and the reasons why organisational change is necessary……… |
| 2. Budget |
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| 3. Organisational structure |
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| 4. Potential options |
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| 5. Staffing impact |
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| 6. Mitigating action |
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| 7. Equalities impact assessment |
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| 8. Next steps |
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If the governing body ratifies the proposed new staffing structure, the Headteacher will seek support of the school’s human resources provider to implement the new staffing structure in accordance with the agreed model procedures, with effect from <insert date>.

It should be noted that the governing body are being asked to make a decision about a new staffing structure and will not be involved in decisions about selection of individuals for potential redundancy should this become necessary. Governors may be required to sit on an appeals panel at a later stage in the process.

The Headteacher will carry out the necessary consultation with trade unions and provide support and information for staff affected.