Logo, company name

Description automatically generatedEPM Model Organisational Change Policy

[School/Academy Name]

[Please note prior to adopting this policy you should:

* Ensure you have adapted it where necessary to fit the requirements of your School/Trust
* Follow your usual governance process to be approved by Governors/Trustees
* Follow your usual process to consult on new or amended HR policies with trade unions

If you are part of a multi-academy trust, please check with your Trust prior to adopting any new or amended policies. If you are a Local Authority Maintained School, please check with your LA prior to adopting any new or amended policies.]

Policy Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Amendments/Comments | Reviewer/s |
| June 2022 | 1.0 |  | AVW |
| June 2024 | 1.1 | formatting | ACA |
| June 2025 | 1.2 | Amended at 7.1.5 and 8.1 | ACA |
|  |  |  |  |

EPM Model Organisational Change Policy

1. Introduction
   1. The [Governing Body/Trust] is committed to ensuring its workforce operates effectively and efficiently.
   2. The [Governing Body/Trust] will exercise good practice and regularly review its organisational structure to ensure that it is fit for purpose and delivers the best possible outcomes for pupils and is financially sustainable longer term.
   3. The [Governing Body/Trust] aims to ensure security and stability of employment as far as possible. However, in light of funding limitations, service delivery requirements and external factors, organisational change may be necessary.
   4. Organisational change refers to strategic change which has the potential to affect jobs and may result in the redeployment of employees and redundancy.
   5. The purpose of this policy is to provide a framework for organisational change to be planned and implemented in an open, fair and consistent manner.
   6. Definitions

**Headteacher** also refers to any other title used to identify the Headteacher, where appropriate.

**Employee** refers to any member of the staff, teaching and support, employed to work at the School.

1. Scope of this Policy
   1. This policy applies to all employees of the [Governing Body/Trust].
   2. This policy does not form part of the employee’s contractual terms and conditions and may be amended from time to time.
2. Principles
   1. When managing organisational change, the [Governing Body/Trust] will comply with all legislative requirements and operate in accordance with this policy.
   2. The [Governing Body/Trust]is committed to a consistent and ongoing approach to resource planning. Non-salary spending will be continually reviewed in order to minimise budget-driven staffing changes.
   3. Employees who are affected by organisational change will be provided with appropriate information and support in a timely manner. This includes employees who are absent from work for any reason.
   4. Where organisational change may lead to redundancy, the [Governing Body’s/Trust's] Redundancy Policy and Procedure will be followed at the appropriate time.
3. Scheme of Delegation
   1. Those responsible for managing organisational change will do so in accordance with the [Governing Body’s/Trust's] Scheme of Delegation.
4. Equality and Equality Impact Assessment
   1. The [School/Trust] will manage organisational change in accordance with equalities legislation and reasonable adjustments will be considered where required.
   2. An Equality Impact Assessment (EIA) is not a legal requirement, however, will be automatically considered when organisational change is being planned and a determination made as to whether or not an initial assessment is sufficient or identifies the need for a full EIA.
   3. An appropriate EIA will be followed, where one is deemed necessary.
   4. When an EIA is undertaken, this will be included in the business case submission.
5. Planning Organisational Change
   1. Organisational change will be planned carefully and with consideration to the [School’s/Trust's] Improvement Plan and wider organisational strategy.
   2. Consideration will be given as to whether the aims of the required change can be achieved without a staffing restructure, for example, through non-salary related spend or a review of job descriptions and working practices.
   3. It is recognised that the financial situation, or other factors, may change at any stage of the organisational change process and any such changes will be responded to.
6. Business Case
   1. A business case will be produced, and this will detail the proposed organisational change. The business case proposal will include the following:
      1. Rationale for change.
      2. Current and proposed staffing structure (including job descriptions, person specifications and salary levels).
      3. Identification of new and changed posts.
      4. Implementation plan, including slotting in arrangements and/or selection process as appropriate.
      5. Timeline including consultation period with employees and trade unions.
      6. Any salary protection/safeguarding arrangements, as appropriate.
      7. Appeals process, including specific grounds of appeal.
      8. Equalities Impact Assessment consideration or detail, as appropriate.
   2. The proposed new structure will be assessed for suitability and sustainability, particularly in terms of cost.
   3. A job description and person specification will be created for new posts in the proposed structure. New roles should be assessed against the relevant job families/benchmarked or evaluated in line with the relevant job evaluation scheme, as appropriate.
   4. Where potential redundancies are identified, the [School/Trust] will follow their Redundancy Policy and Procedure.
   5. Formal approval will be gained on the proposals, in accordance with the [Governing Body’s/Trust's] Scheme of Delegation, prior to the implementation of the organisational change.
7. Implementation
   1. A period of [X days – ensure consistency with your Redundancy Policy and Procedure] formal consultation will be held with employees directly affected by the organisational change and the recognised trade unions. Where 20 or more redundancies are proposed at one establishment within 90 days, statutory consultation periods under TULRCA 1992 will be followed (i.e. 30 days for 20–99 employees, and 45 days for 100+).
   2. All contractual changes will be confirmed in writing with appropriate notice.
   3. Training needs will be discussed with employees who have a change to their role as a result of the organisational change process.
   4. Any vacancies that arise during the organisational change process will be subject to normal recruitment procedures unless potential redundancies have been identified. Then the [School/Trust] will follow the provisions set out in their Redundancy Policy and Procedure to recruit to the new structure.