

HOW TO MANAGE STAFF THROUGH THE TRANSITION PROCESS

The main aims of Charity Business' finance solutions are to promote efficiencies in your organisation's finance function and reduce finance overheads. Important to note is that a critical part of outsourcing the finance function is your staff. It is therefore important that staffing issues are factored into the outsourcing process right from the start.

In an outsourcing project, legislation known as **TUPE** (the Transfer of Undertakings (Protection of Employment)) Regulations 2006) apply. Broadly, TUPE means that staff who currently work in your finance function will automatically transfer to us and you must consult with those staff about the outsourcing itself.

Consultation involves meeting with employee representatives and providing them with certain information about what is happening. In addition, if any changes to your staff's terms and conditions of employment are planned after the outsourcing takes place, you will need to consult with the representatives about those planned changes. Depending on the type of changes themselves and the reasons why the changes are being considered, it may or may not be possible to make those changes under TUPE. In addition, TUPE requires you to provide certain 'Employee Liability Information' to Charity Business.

Charity Business has teamed up with **Mogers**, a Bath based firm of solicitors to assist you in handling the employment aspects of the outsourcing. At the start of the process, Mogers will meet with you to consider and plan how to consult with your staff and tackle other employment issues which may arise.

Mogers will provide you with a draft **time table of events** dealing with the process of consulting your staff. They will also provide you with a **precedent pack of template letters and documents** to be sent to staff and/or their representatives at designated times as well as other documents you will need to produce, such as when you provide the Employee Liability Information. Through working in conjunction with Mogers we aim to make the consultation process with staff as straight forward and as transparent as possible.

As we know **costs** are important to you, we have agreed with Mogers an initial fixed fee for part of the staff advice you need. Mogers would charge a fixed fee of £675 plus VAT and disbursements to:

1. Meet with you to discuss and plan the draft staff timetable (see above);
2. Provide all 'Precedent Pack' information to be completed by you; and
3. Provide two hours of telephone advice to you on the TUPE transfer process and any issues which may arise.

Any assistance you require over and above the included hours in point 3 above would be charged at £160 per hour plus VAT and disbursements.

During the course of staff consultation you may reach the point where you part company with an employee. They may either object to the outsourcing (which they have a right to do) or you may agree a termination package. Often termination packages are done via a compromise agreement. If you do need advice about an employee exit, Mogers will be able to provide competitively priced advice to you.

Please contact Susan Gordon or Mark Freeman (marketing@charitybusiness.com or 01793 554 204) at Charity Business if you have any questions about staffing issues or the Mogers package.