

## TUPE Transfer to Bridgwater Town Council

### Timeline

| <b>Date</b>                       | <b>Action</b>   | <b>Responsibility</b>           |
|-----------------------------------|---|---------------------------------|
| w/c 29<br>February 2024           | Need to identify all affected roles and staff so that HR can begin to pull together the Employee liability information to send to Bridgwater Town Council | HR/Managers                     |
| 29 February<br>2024               | Advise HR Admin & Payroll of proposed transfer and names of staff to provide Employee liability report from payroll                                       | HR                              |
| 29 February<br>2024               | Advise Stephen Morton, Strategic Manager Pensions Management in Finance of proposed transfer and names of staff for pension deficit implications.         | HR                              |
| 29 February<br>2024               | Advise Peninsula Pensions of proposed transfer.   | HR                              |
| 29 February<br>2024               | Advise Marcus Watkins HRAP service manager of affected employees for payroll purposes   | HR                              |
| 7 <sup>th</sup> March             | Affected staff formally notified of devolution proposal to Bridgwater Town Council  | Sarah Dowden & Jonathan Stevens |
| 7 <sup>th</sup> March             | Send Confirmation of TUPE letter to Trade Unions  | HR/Manager                      |
| By 7 <sup>th</sup> March<br>2024  | Send Employee liability information to Bridgwater Town Council  | HR/Manager                      |
| 7 <sup>th</sup> March             | Sarah, Jonathan and HR to meet with BTC   | HR/Manager                      |
| WC 11 March<br>2024               | Confirmation of TUPE letter to Staff<br>Send invite to Staff and Tus to Consultation meeting  | Manager                         |
| WC 11 <sup>th</sup> March<br>2024 | Bridgwater Town Council to confirm measures and send measures letter. (If available)  | Manager                         |
| 13 <sup>th</sup> March            | Report to Joint Consultative Forum (JCF)  | Sarah Dowden & Jonathan Stevens |
| 18 <sup>th</sup> March            | Write to TU s and staff about measures (As soon as available)   | HR/Manager                      |
| 20 March 2024                     | Joint Consultation meeting for Staff and Tus<br>Send copy of measures letter (BTC to provide), structure chart (BTC to provide),                          | Manager/HR                      |

|                           |  |                                 |
|---------------------------|--|---------------------------------|
| 20 March 2024             | Q&A Session with representatives of Somerset Council and Bridgwater Town Council   | Managers/HR                     |
| 21 March 2024             | Send 1 <sup>st</sup> consultation meeting notes to SC and BTC  | HR                              |
| WC 25 <sup>th</sup> March | Opportunity for 1 to 1 meetings  | Manager/HR                      |
| WC 25 <sup>th</sup> March | SC to respond to Measures letter   | Manager/HR                      |
| WC 25 <sup>th</sup> March | Non-key decision paper to be signed  |                                 |
| <b>28 March 2024</b>      | <b>Full staff information to be provided to Bridgwater Town Council</b><br><br><b>N.B. This is a statutory requirement to meet this date.</b>          | <b>HR</b>                       |
| 8 <sup>th</sup> April     | Bridgwater Town Council to send updated/final measures letter (if required)  | BTC                             |
| WC 8th April              | 2 <sup>nd</sup> joint Consultation meeting for Staff and Tus. Updated measure letter to discuss<br><b>DATE NEEDS ADDING TO DIARYS FOR THIS INC BTC</b> | Manager/HR                      |
| WC 8th April              | Q&A Session with representatives of Somerset Council and Bridgwater Town Council   | HR/Manager                      |
| 10 April                  | Update Report to JCF   | Sarah Dowden & Jonathan Stevens |
| WC 15 April               | Final joint consultation meeting with staff TU and BTC – <b>IF NEEDED TBC</b>  | HR/Manager                      |
| w/c 22nd April 2024       | Final confirmation letter to individual staff members to confirm their transfer of employment and the transfer of key documents from their HR file.    | HR/Manager                      |
| 24 April                  | Consultation closes  |                                 |
| 1 May 2024                | Staff Transfer<br>Transfer Staff Files   | HR                              |