



Membership Application

LTU, St John's Terrace, 3-7 Amptill Street, Bedford MK42 9EY Tel 01234 262868 Fax 01234 262821 www.ltu.co.uk 24hours@ltu.co.uk

Title

Surname

Forename(s)

Home address

Postcode

Date of birth

Payroll number

Branch/Office/Dept

Location code

Home telephone

Work telephone

Personal Email address

Work Email address

Job title

Pay band

Date of joining group

Vassar Smith Fund

The Vassar Smith Fund is a registered charity which provides support and financial assistance to current, retired and former members of staff and their dependants.

If you would like to contribute to the Fund tick this box to make a monthly contribution of 10p or, if you would like to donate more simply write the amount you would like us to add to your subscription in the same box.

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Signature Date

To receive LTU newsletters by email ... tick here

Email address preference (please tick) Personal Work

14th November 2007

All Members Newsletter

Branch Network Role Changes

The Bank will be introducing a new role into the Network, B6 Sales Manager, and they will be responsible for managing teams of Personal Bankers.

The B6 Service Team Leader role will be responsible for supporting the CSM in managing Customer Assistants and looking after the operational needs of the Branch.

The new Sales Manager role is based on the B5 Sales Manager role which was introduced in the largest 25 branches last year. There will be 275 of these new roles and all existing Team Leaders will be asked to submit a preference for either the Sales Manager or Service Team Leader role in Phase 1 of the role allocation process. Phase 1 takes place between the 9th and 22nd November and will be an assessment carried out by the Local Director based on the skills and competencies of the new role. However, if the new Sales Manager role cannot be filled by staff from the current Team Leader population then the Bank has said that a wider pool of candidates, including PBM's, Account

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Team Leaders Or Sales Managers Account Openers

Openers (Personal Bankers), B6 Branch Managers and B6 CSM's, will be able to apply for the role.

Those Team Leaders who are not successful in securing one of the new Sales Manager roles, or who chose not to apply in the first place, should remain in the Band 6 Service Team Leader roles. The Bank has said that the total number of CSM's, Sales Managers and Team Leaders will reduce by approximately 100 from 1550 to 1450 and so not all Team Leaders will get a Band 6 role following this reorganisation. In those circumstances the Band 6 Service Team Leaders must be found 'suitable alternative employment'.

Instructions to your Bank or Building Society to pay by Direct Debit

Please fill in the whole form and send it to:
Lloyds TSB Group Union, St John's Terrace, 3-7 Amptill Street, Bedford MK42 9EY

Originator's Identification Number
8 3 0 2 7 1

- Name and full postal address of your Bank or Building Society

To: The Manager
Address Bank or Building Society
Postcode
- Name(s) of account holder(s)
- Branch sort code
- Bank or Building Society Account Number
- Lloyds TSB Group Union reference no.
- Instructions to your Bank or Building Society. Please pay Lloyds TSB Group Union Direct Debits from the account detailed on this instruction subject to the safeguards assured by The Direct Debit Guarantee. I understand that this instruction may remain with Lloyds TSB Group Union and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)
Date

The Direct Debit Guarantee This Guarantee should be detached and retained by the Payer.

- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.
- If an error is made by Lloyds TSB Group Union or your Bank or Building Society you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please send a copy of your letter to us.
- If the amounts to be paid or the payment dates change Lloyds TSB Group Union will notify you 10 working days in advance of your account being debited or as otherwise agreed.

What is 'Suitable Alternative' Employment

Staff should note that during reorganisations they have a number of rights under both the Job Security Policy and legally.

In particular, displaced staff have a legal right to be offered 'suitable alternative employment'. If this is not available, which it will be for this reorganisation, then they must be offered the Group's Voluntary Severance terms.

'Suitable Alternative Employment' would be:

- **a position at the same band or level of seniority or one band below with full PPA protection;**
- **within the skills, competencies and experiences of an individual, subject to adequate training;**
- **a 'proper job' rather than one of only a short-term nature;**
- **with similar working patterns.**

From Account Opener To Personal Banker

According to the Bank the Account Opening role has been a roaring success with much of the sales growth in the Network coming from this new role. In Q2, which is the latest data we have, some 69% of Account Openers received a bonus. Those same figures also show that some 1,600 Account Openers, out of a population of 3,500, had a combined sales and referrals performance of more than 75.

The Bank have been reviewing the Account Opening role and the proposed changes for next year involve:

- **the job title being changed from Account Opener to Personal Banker;**

- **maintaining of card and home protection accreditation;**
- **the introduction of a new deployment model to ensure that Personal Bankers are in branches which enable them to hit their referral and sales targets;**

Deployment and Role Suitability

We know there are 650 Account Openers who have had difficulties in achieving their sales and referral levels and the main reason for this is because staff are in branches where there simply isn't the opportunity. Equally there are some branches which require more Personal Bankers in order to meet the Bank's 'no appointment necessary' objective. It is also the case that when the role was introduced at the end of 2006 some staff were pressurised into taking the role despite the fact they had no desire to become sellers and the thought of becoming fully fledged members of the Bank's salesforce team with all that entails is an anathema to these individuals. The Bank accepts that there are some people who feel this way and the work to deploy Personal Bankers to match opportunity which is currently being worked on will enable those members of staff in discussions with their Line Managers to voice their concerns about the direction of the role and to seek alternative positions elsewhere within the branch. LTU will be insisting that these staff have their pay and allowances protected.

Your Mobility Rights

The results of the deployment modelling exercise, which are being discussed with LTU, will inevitably result in some Personal Bankers being asked to move branches. Some staff could be asked to move to another Local Director Group or even Area Director Group if they live and work close to a 'border'. However, any such movements are subject

to them meeting the reasonable travelling guidelines set out in the staff manual.

Whilst each individual's circumstances must be dealt with on their own merits, the circumstances that may justify an individual arguing successfully that they cannot be expected to transfer might include:

- **Distance from Home.** As a general guide, a travel distance of beyond 25 miles from home will be considered unreasonable. Any transfer beyond this distance can typically be declined.
- **Duration of Journey.** As a general guide, a transfer will only be considered reasonable if the journey from home to work takes less than 1 hour 15 minutes to complete, account should also be taken of reduced hours working or work options patterns. A longer journey time would typically provide grounds to refuse a transfer.
- **Availability of Public Transport.** You are not obliged to either own a car or use it to get to and from work (other than where you have been provided with a Bank Car). The maximum journey time is therefore normally based on how long it would take you from door to door, travelling by public transport. However, where you currently use a car

to travel to and from work, your manager will be entitled to 'presume' that you will continue to do so, unless you are able to show that this is no longer appropriate.

- **Childcare Arrangements.** Any transfer must take full account of any childcare arrangements that you may have. So if the move would mean you could no longer continue to use the same nursery, or continue to accompany your children to or from school at the same time, then you may have grounds to refuse the transfer.
- **Other Personal Circumstances.** In a similar way to childcare arrangements, if you have other regular domestic commitments that you would be unable to continue as the result of a transfer, then these must also be taken into account. Such circumstances might include the need to visit a dependant relative on a regular basis.

Members affected by this reorganisation or who have questions on its impact should contact the Union as follows:



Mark V Brown
Assistant General Secretary