

# **APPENDIX 2**

## **A Guide for Regional Distribution Centre and Walk Bundling Centre Resourcing Realignment**

## **A GUIDE FOR REGIONAL DISTRIBUTION CENTRE/WALK BUNDLING CENTRE RESOURCING REALIGNMENT**

In line with the National Joint Statement on Resource Realignment, when conducting joint realignment activity in Regional Distribution Centres/WBC's, using Nationally agreed tools, both parties must comply with the following guidelines:

1. Agree joint communication to employees regarding any realignment activity and joint aims and objectives.
2. Agree baseline period i.e. an average week to resource.
3. Agree levels of additional earning opportunities i.e. the level of Scheduled Attendance that meets employee aspirations and achieves workplan clearance.
4. Verify all work area cut-off and dispatch times.
5. On a pre-shift basis shift managers and CWU representatives to verify any traffic changes to the agreed baseline figure, to ensure that any alteration in the projected traffic is captured and accommodated.
6. Establish total hours required in all processes on all shifts including indirect hours; by using baseline traffic and actual throughputs. You may seek to improve actual throughputs via agreed process and all layout changes; any such change will have to be tested before using the improved throughputs. Ensure all hours are captured including indirect and other hours.
7. Jointly establish traffic arrival profile and review the confirmed network plan, including those associated to changes required for the deployment of the LAT product.
8. Review traffic arrival profile to consider converting hours into AWDs and SAs, in each work area of all shifts.
9. Agree the outputs of any realignment activity, ensuring that any resulting changes accommodate the SWW across all shifts and duties and are deployed in the most effective manner, while maintaining full operational coverage.
10. Align shift patterns to employees on minimum disruption basis and in line with the National agreements, while at the same time ensuring effective alignment to workload that avoids stranded costs.
11. Once current Staff in Post (SIP) (full time and part time) have been realigned to the shifts, any gaps in resourcing to be filled using the following resourcing principles:
  - I. Part Time to Full Time or part time extended contractual hours, ensuring flexibility is in place to support correct alignment of hours against the workload.
  - II. Any subsequent shortfall will be addressed by recruitment.

## **GUIDANCE DOCUMENT REGIONAL DISTRIBUTION CENTRE/WALK BUNDLING CENTRE RESOURCING MEETINGS**

### **Meeting Guidelines**

A Joint Working Group of representatives from Royal Mail and the CWU met to develop and review best practice and materials for weekly resourcing meetings and to establish and reinvigorate the process for holding these meetings. The following guidelines summarise the outputs from this discussion and are to be used to form the basis of the weekly resourcing meetings held in RDC's/WBC's. This document should be used alongside the standard format for capturing and displaying meeting outputs for all employees to see.

### **Aim and Purpose of the Weekly Resourcing Meeting**

The aim and purpose of the meeting was agreed as a forum where both Royal Mail and the CWU have a shared goal and are speaking a common language and also to have an honest approach even when there may be difficult messages to get across. The focus should be to review past and current resourcing along with clearance to work plan and to identify what the resourcing needs are for the week/s to come. It was highlighted that there were a number of pre-requisites for this:

- Correct and simple information that is easy to understand for both parties.
- Honest approach even when there are difficult messages.
- Structured agenda – know what to discuss.
- Appropriate attendees:
  - Everyone involved
  - All reps and all shift managers
  - Each shift to have separate meetings.
- Clear outputs and owners.
- Tie in to weekly SI meeting with area reps.
- Clear understanding of the tools used in the plant.
- Level of knowledge for attendees to be equal.
- Ownership and governance down to WAM level.
- Way forward even when there is a conflict of views.
- Clear understanding of demand and performance levels.

### **Meeting Process**

Resourcing meetings are mandatory meetings and should take place every week as a minimum and supplemented by daily and quarterly interaction. The recommendation for the attendees and structure of these meetings follows a tiered approach:

- Quarterly meetings to include Plant Manager/Area Rep/PCM/Engineering Representative. An open invitation will also be extended to the Regional Manager and Divisional Representative to attend. The meeting will be minuted.

- Weekly SI/Plant manager level – Plant Manager/Area Rep/PCM/Engineering Representative.
- Weekly at shift level - PCM/Shift Manager/Shift Rep/WAMs.
- Daily touchdown at the start of every shift – Shift Manager/Shift Rep/WAMs.

### **Content to be reviewed during the Quarterly Resourcing Meeting**

The quarterly meetings should take place at key points in the year: March, June, September and December. The following should be discussed and reviewed during these meetings:

- Any known future plant changes.
- Previous quarter's performance.
- Throughput changes required due to changes.
- Machine moves.
- Staff changes – known leavers/retirements.
- Resourcing mix – 12 week review.
- Work plan.
- Agreed Projects.
- Special events planning/seasonal requirements.
- Resource alignment.
- Training plans/skills needed.
- Review of weekly resourcing meetings and resourcing in line with job security agreement.
- Benchmark other plants.
- Engineering requirements/plans.

### **Content to be reviewed during the Weekly Resourcing Meeting**

There are three specific areas: base data, previous week's performance and the coming week's plan. Within these areas there are a number of topics that should be discussed.

#### ***Base data needs to be accurate and known:***

- Arrival profile.
- Local workplan.
- Production scheduler detail.
- Skills register (to be jointly reviewed on a quarterly basis).
- Annual leave agreement.
- Scheduled attendances.
- Seasonal adjustment requirements.
- Engineering requirements/plans.

#### ***Previous week's data:***

- Hours spend against the plan.
- Traffic actuals v forecast.
- Clearances to workplan.
- Seasonal trends/requirements.

***Next week's plan with an overview of the following:***

- Traffic forecasting trends and patterns and know bulk postings (eg end of month spike).
- Absence and annual leave.
- Hours plan for the week.
- Throughputs/efficiency adjustments by shift – if required.
- Pre-list overtime (where known) for hours needed.
- Short notice demand solution (local process).
- Any workplan changes.
- Rehab integration back on to shifts.
- Loans and borrows planned.
- Mech plans.
- Seasonal trends/requirements.
- Engineering requirements/plans.

**Outputs for Sharing with All Staff**

Following the meeting, the outputs should be captured in the Weekly Resourcing Meeting template and displayed for staff. Any overtime requirements should also be communicated as early as possible to staff.

## Agenda

Topic	Discussion Points	Inputs
Previous week's resourcing	<ul style="list-style-type: none"> <li>• Did we experience any specific staffing / resourcing issues?</li> <li>• What was the actual traffic v the plan</li> <li>• Did we clear to workplan in all areas? If not actions need to be taken this week to ensure clearance?</li> <li>• Do we need to communicate anything to staff / put on notice board as a result?</li> </ul>	<ul style="list-style-type: none"> <li>• Production scheduler</li> <li>• Actual traffic and hours</li> </ul>
Next week's resourcing	<ul style="list-style-type: none"> <li>• What are the traffic forecasting trends and patterns and know bulk postings (eg last week of month spike)?</li> <li>• What does the mech plan require?</li> <li>• What is the absence and annual leave cover required and are any loans and borrows planned?</li> <li>• What is the hours plan for the week? Throughputs/efficiency adjustments by shift - if required?</li> <li>• Is there a requirement for pre-list overtime?</li> <li>• Do we have a short notice demand solution (local process) in place?</li> <li>• Are any workplan changes required?</li> <li>• Do we have any rehabs that need integrated back on to shifts?</li> <li>• Loans and borrows planned</li> <li>• What is the early view of the resourcing plan for two weeks' time?</li> <li>• Do we need to communicate anything to staff / put on notice board as a result?</li> </ul>	<ul style="list-style-type: none"> <li>• Production scheduler</li> <li>• Traffic forecast</li> <li>• Annual leave and absence plan</li> <li>• Contingency plan</li> <li>• Skills register</li> </ul>

<p>Quarterly resourcing meeting</p>	<ul style="list-style-type: none"> <li>• What was the previous quarter's performance and are any throughput changes required?</li> <li>• Are there any future plant changes or machine moves planned?</li> <li>• Staff changes - are there any known leavers/retirements and what is the resourcing solution?</li> <li>• Do we have the correct resource alignment with all the right hours in the right place? What has the labour model mix been during the last 12 weeks?</li> <li>• Review of weekly resourcing meetings and resourcing in line with the job security agreement.</li> <li>• Have we got any skills gaps and do we need to put a training plan in place?</li> <li>• How are we progressing against the work plan and deployment of agreed projects?</li> <li>• Are there any special events coming up that we need to plan for?</li> <li>• Review of areas for improvement and possible benchmarking other plants' practices and methods to seek improvements</li> </ul>	<ul style="list-style-type: none"> <li>• 13 week plan</li> <li>• Skills register</li> <li>• Annual leave and absence plan</li> <li>• Work plan</li> <li>• Special events calendar</li> </ul>
<p>Any Other Business (discuss when required)</p>	<ul style="list-style-type: none"> <li>• Use the opportunity to discuss any other issues in the plant and to talk about what went well in the last quarter.</li> </ul>	

## Information / Notes Sheet

Plant Name		Date	
RM representatives		CWU Representatives	

Last week's resourcing		
	Planned v Actual	Comments
Traffic Volume	[Excerpt from production scheduler]	
Hours	[Excerpt from production scheduler]	
Clearance or resourcing issues / Improvement opportunities to note:		



Next week's resourcing		
	Planned	Changes / Resourcing Issues / Actions to note:
Traffic Volume	[Excerpt from production scheduler]	
Hours	[Excerpt from production scheduler]	
Pre-list overtime requirement		
Resourcing changes or improvement opportunities to note:		

Planning for two weeks ahead		
	Planned	Comments
Traffic Volume	[Excerpt from production scheduler]	
Hours	[Excerpt from production scheduler]	
Resourcing Issues to consider (including A/L, sick, ad hoc requests, training etc.):		

Any Other Business
Notes

**RESOURCING CHECKLIST – REGIONAL DISTRIBUTION CENTRE/WALK BUNDLING CENTRE**

1. Are weekly Regional Distribution Centre resourcing meetings held every week and on all shifts by the relevant managers and CWU reps?
2. Are the agreed standard resourcing meeting agendas followed for the weekly, monthly and quarterly resourcing meetings?
3. Have you reviewed the previous quarter's performance and are any throughput changes required?
4. Have you reviewed any plant changes, machine moves or are there any agreed projects scheduled that will impact on resource required?
5. Do you have the correct resource alignment with hours in the right place to achieve full clearance and deliver QoS?
6. Have you reviewed the resourcing model for the last 12 weeks and does this need to change? Have you reviewed if Part Time staff are consistently working increased hours and if so do these need to be addressed by offering additional contractual hours to P/T staff?
7. What has the agency usage been over the last week/month/12 weeks – do you need to change the resourcing structure to reduce/eliminate reliance on agency hours?
8. Have you discussed any FTCs and have these been reviewed?
9. Do you discuss staff changes weekly to understand if there are any known leavers/retirements and if so the appropriate resourcing solution?
10. Have you reviewed skills gaps and if any training is required?
11. Do you review regular 'loans and borrows' and look for permanent solutions?
12. Is there a robust annual leave planning process in place that aligns annual leave to workload, meets employees' aspirations and also provides flexibility for ad hoc days for employees?
13. Are extra leave slots available in the summer as a result of the reduced workload?
14. Are the Working Time Regulations fully complied with?