

HR Timeline - LEP TUPE In

LEP Tupe In 1 March 2024

Activity	Responsible	Comments	Start Date	Completion Date
Project Commissioning and Scope				
LEP transition Meetings to discuss TUPE in	Transition Board		03/11/23	29/02/2024
Infor relevant HR departments and IT of Transfer in	Angela Gray		03/11/23	14/11/2024
Meet with LEP HR to discuss transferees	Angela Gray		16/11/23	29/02/2024
Legal				
Check original contract(s) with transferor for indemnities and warranties in the event of TUPE transfer and seek further legal advice in the event this is not covered by original contract -may need TUPE Transfer Agreement (see section 4)	Legal			
Due Dilligence				
Request data, from LEP HR on who is in scope and discuss any challenge or dispute	Angela Gray	Data in and initial scope sent to systems. More info requested from LEP HR	16/11/23	09/01/24
If redundancies are proposed complete business case giving clear ETO reason	N/A			
Check with LEP HR if there are any Union Recognition agreements in place	Angela Gray		16/11/23	30/11/23
Request Organisation Structure from LEP HR	Angela Gray		16/11/23	30/11/23
Request terms and conditions, pay structure, structure chart and contractual policies from LEP HR	Angela Gray		16/11/23	30/11/23
Complete a terms and conditions and benefits comparison	Angela Gray		01/12/23	14/12/23
Get data from transferor on allowances and deductions and complete Allowances and Deductions SAP template	Angela Gray		16/11/23	30/11/23
Discuss and agree structure and terms and conditions with SAP Systems	Angela Gray	Draft sturcture sent to systems	01/12/23	28/02/24
Consultation				
Agree joint constultationn dates with LEP HR	Angela Gray		16/11/23	30/11/23
Inform relevant unions of Transfer into the Council.	Angela Gray		29/11/23	29/11/23
Start of Consultation meeting - arranged by LEP	Angela Gray	Steve & Richard present	05/12/23	05/12/23
Face to face consultation meeting	Angela Gray	2nd Consultation meeting 8/1/24. Consultation extended to 23/1/24	08/01/23	08/01/20
Input to any FAQs raised by transferring employees	Transition Board		08/01/24	29/02/24
Hold 1:1's with transferring employees (where agreed with LEP)	Steve Bambrick/Richard Ambrose		08/01/24	29/02/24
Joint end of Consultation meeting - arranged by LEP	Angela Gray	Steve & Richard present	09/01/24	09/01/24
SAP Configuration				
Request final due dilligence information from LEP HR (must be given in full by 28 days before transfer) and send to HR	Angela Gray		01/12/23	31/01/24
Complete and send Pensions spreadsheet to LGPS	Angela Gray		01/02/24	01/02/24
Final structure chart to SAP Systems	Angela Gray	Draft sturcture sent to systems	01/02/24	01/02/24
Request and gain copies of right to work information (if not already gathered from 1-1 with service)	Angela Gray	To be brought in by staff on 8/1/24	05/12/24	29/02/24
Request and gain copies of bank details and share with Payroll	Angela Gray	Info received	05/12/24	29/02/24
Request payslips from LEP	Angela Gray		01/02/24	29/02/24
Confirm the Transfer				
Request LEP HR to send P45's for transferring employees and send to payroll	Angela Gray		01/03/24	
Arrange security passes and first day details to new employees	Line Manager		01/03/24	
Arrange induction programme for new employees to include C4P overview	Steve Bambrick/Richard Ambrose		01/03/24	
Send welcome letter to new employees	Angela Gray		01/03/24	

LEP integration - Operational workstream

Action	Responsible	Start	End	Comments
1. Establish new Enterprise & Investment Board				
Growth Board agree membership of the Enterprise & Investment Board	Rachael S	Nov	04-Dec	Complete
New members officially invited to join	Martin Tett	Dec	Dec	after agreed by GB
Draft full EIB terms of reference	Richard A	Dec	Jan	
ToR agreed by Growth Board	Richard A	Feb	Feb	8 Feb meeting
Set meeting dates	Richard H	Feb	Feb	after ToR agreed
Send invites	Richard H	Feb	Feb	
Agree agenda and papers	Richard H	Feb	Mar	
First meeting of new Board	Richard H	Mar	Mar	
2. Growth Board governance				
High level changes to governance agreed by Growth Board	Rachael S	Nov	04-Dec	Complete
Draft amendments to GB ToR plus sub boards to reflect business voice	Claire P	Dec	Feb	
Growth Board review proposed amendments to ToR	Richard A	Feb	Feb	additional meeting 8 Feb
Compile register of interests	Claire P	Jan	Mar	
Develop GB forward plan for March meeting	Claire P	Jan	Feb	draft for Feb meeting
3. Establish new economic development investment fund				
Outline scope of the fund drafted and shared	Richard A	Dec	Jan	
Fund arrangements agreed				
- Growth Board	Richard A	Jan	Jan	8 Feb meeting
- Cabinet?	Richard A	Jan	Feb	at this point or alongside strategy?
Investment Board input into proposed approach	Richard A/Richard H	Mar	Mar	at first meeting
Engage professional advisor to support bids assessment	Richard A/Richard H	Mar	May	
Launch fund	Richard H	May	May	
Develop a single new service level agreement (SLA) with BBF to oversee funding arrangements for the growth hub, skills hub and business support service				
Identify (likely) budget available for 24/25 (includes assumptions around government funding)	Richard A	Nov	Jan	
Confirm SLA/Grant/Contract requirements with Procurement/Legal	Claire P	Nov	Dec	
Confirmation of government conditions (reporting etc)	Claire P	Dec	Jan	
Engage with BBF about future approach/focus	Richard A	Dec	Jan	Complete
Draft future agreement including activities, standards and performance measures	Claire P/Ian B	Dec	Jan	
Growth Board outline of funding approach	Richard A	Feb	Feb	Overview paper to Growth Board 8 Feb
Funding agreement drafted	Claire P	Jan	Mar	Schedule to be agreed at Mar GB
5. Develop new Buckinghamshire Economic Strategy				
Review Government Guidance on Economic Strategy Refresh	Ian B/Claire P	Jan	Jan	
Agree preferred approach to development of the strategy - inhouse/consultants	Richard H/Richard A	Dec	Jan	Depending on approach resource will unlikely
Principles paper for Economic Strategy refresh	Richard H/Richard A	Jan	Feb	Outliine paper for 8 Feb Growth Board

Finance Workstream Action Plan

Action	Description	Owner	Start Date	Completion Date
LEP's Finance Systems & Accounts				
Agree plan for Final Set of Accounts		BLEP Executive & Richardsons	01/12/23	22/01/24
Deliver Final Set of Accounts - discuss how this will work with Richardsons, eg, what happens in bank account not fully closed by 31 March? Do we need extra set of accounts?	Deliver Final Set of Accounts.	Richardsons/BLEP Finance	01/04/24	31/07/24
Settle All outstanding supplier debts		BLEP Finance (Uma)	01/01/24	01/03/24
Settle Corporation Tax Liability	Amounts agreed following LEP AGM	BLEP Finance (Uma)	01/01/24	01/04/24
Bank Account - transfer any ongoing Direct Debits	Upon completion of all supplier debts - direct debit arrangements to be closed / transferred to BC	BLEP Finance (Uma)	01/01/24	01/03/24
Archive Xero system.		BLEP Finance (Uma) + BC Finance & BC IT	01/08/24	30/08/24
LEP Contracts				
Operational				
Liaise with Council IT team to agree transition requirements	Claire H to arrange meeting with BC IT and LEP, to go through requirements and get IT on board/	BC Finance to arrange meeting	01/12/23	08/01/24
Create a detailed list of all existing contracts and individual transition arrangements, to include:		Ian Barham	22/12/23	08/01/24
IT Services	Procured through contract with BBF - Delivered by Mirus IT Solutions		01/12/23	01/03/24
Software System Licences	Power BI, Tableau, Chat GPT	Ian Barham	01/12/23	01/03/24
Website Hosting	5 websites & micro-sites - LEP, Enterprise Zone, BA, Woodlands & Data Observatory - hosting fees and licences	Ian Barham	01/12/23	01/03/24
Marketing Services	E newsletters, database records and CRM hosted by BBF - need to ensure continued access to CRM	Ian Barham	01/12/23	01/03/24
Finance & Accounting Support	Richardsons contracted on annual basis - notice already served as non appointment in 2024/25	BLEP Executive	01/12/23	01/03/24
HR	You HR - Annual Contract, notice already served - ability to procure on monthly basis if necessary	BLEP Executive	01/12/23	01/03/24
Insurances - Packetts	Annual Contract for Directors & Employers Liability	BLEP Executive	01/12/23	01/03/24
Data Services	Beauhurst, Lightcast, Co-Star & Banksearch	BLEP Data Team (Caroline)	01/12/23	Various Renewal Dates
Company Pension	Royal London - will need to be closed and transferred to Local Government Pension Scheme	Richardsons / BLEP Finance	01/02/24	01/03/24
BBF Growth Hub & Additional Services	Agreement for shared marketing & data research functions - signed annually.	BC Legal		Draft
BDT Growth Hub Delivery Contract	Annual Agreement - will transfer directly to Buckinghamshire Council	BC Finance/LEP Executive		01/03/24
Careers and Enterprise Company	Annual Agreement - will transfer directly to Buckinghamshire Council	BC Finance / LEP Executive		01/03/24
BDT Local Growth Programme Reporting Comm	5 year post delivery reporting agreement will continue up until 2028/29	BLEP Executive		01/03/24
Transferring Assets to the Council				
Draft Transfer of Assets Document		Peter Collins (TBC)	01/01/24	31/01/24
LEP Board to approve and sign Transfer of Assets Document (TBC)		Peter Collins/Richard Harrington (TBC)	TBC	TBC
Create new Earmarked Reserve for Investment Fund		Claire H	01/02/24	28/08/24
Tax advice on all asset transfers and ongoing inc	Use PS Tax	Claire H	01/01/24	22/01/24
Transfer remaining Cash Balances to Council		Uma	01/03/24	31/03/24
Get Loans set up on the Council's Balance Sheet		Claire H	01/04/24	May-24
Write Letters to Loan Recipients informing them of change of repayment details	(1) Letter to Loan recipients telling them of change in payee (legal advice needed here)	BC Finance (Claire)	01/02/24	01/03/24
BDUK - Broadband Gainshare	Income resulting from investment in BDUK contracts 1 & 2 - already managed by Buckinghamshire Council	BC Finance (Claire)	01/01/24	01/03/24
Setting up Budgets in Council				
Update Budget, agree with LEP transition group and get Set Up in SAP - Pay and Non Pay.		Claire H	01/01/24	01/03/24
Get new cost centres set up in SAP, with Scheme of Delegation		Claire H	01/02/24	01/03/24

Communications Timeline

LEP Integration

Activity	Responsible	Comments	Start	Completion	Closed
Messaging					
Share current LEP Communications/Transition Plan	Richard Burton	Updated draft plan shared with working group			
Develop FAQ of Reasons for Integration	Ian Barham / Richard Burton	8.1.24 comments back by 16.1.24		Jan-24	Jan-24 No
Highlight Benefits to Buckinghamshire	Ian Barham / Richard Burton	Being prepared by working group		Jan-24	Feb-24 No
Programme Risks					
Identify potential risks	Ian Barham / Richard Burton			Jan-24	Feb-24 No
Identify groups/individuals with reasons for highlighting concerns	Comms Working Group			Jan-24	Feb-24 No
Develop advance response to potential questions	Comms Working Group			Jan-24	Feb-24 No
Audience & Channels					
Review Stakeholders List	Ian Barham / Richard Burton	Shared with working group 8.1.24		Jan-24	Jan-24 No
Identify action plan for informing & tailoring messages	Ian Barham / Richard Burton	Considered at working group 8.1.24		Jan-24	Jan-24 No
Consider use of existing communication channels and activities	All			Jan-24	Mar-24 No
- LEP New Year Message	Richard Burton	Published 6.1.24		Jan-24	Jan-24 Yes
- Monthly E Shot	Richard Burton			Feb-24	Mar-24
- Members Briefings	Sue Robinson / Claire Philips			Feb-24	Mar-24
- LEP Network Campaigns	Richard Burton	Impact of LEP Shared		Jan-24	Jan-24 Yes
Reporting					
LEP Board	Ian Barham	Paper being prepared for Jan 30th		Jan-24	Jan-24 No
Growth Board	Ian Barham	Part of transition update Feb 8th		Jan-24	Jan-24 No
Individual Briefings	All			Jan-24	Mar-24 No
Review of Digital Assets Communication Channels					
Website URL Ownership & Registration	Richard Burton	Completed and shared		Jan-24	Jan-23 Yes
Review of Existing LEP Content & Links	Richard Burton	Completed and Shared - page summary being developed		Jan-24	Jan-23 Yes
Review of Current Council Communications Channels & Websites	Sue Robinson / Claire Philips	For next steering group meeting		Jan-24	Feb-23 No
Review of existing social media channels	Richard Burton	Completed and shared		Jan-24	Jan-23 Yes
Transition of IT Services					
Transfer of URL's	Ian Barham	Information shared with BC IT John Spiers		Jan-24	Jan-23 No
Digital Records / Archives	Ian Barham	Meeting to be arranged with Mirus/BBF/Bucks Council		Jan-24	Feb-23 No
E-mail and phones	Ian Barham	Liaising with John Spiers		Feb-24	Feb-23 No
Supply of new laptops	Ian Barham	Liaising with John Spiers		Feb-24	Mar-23 No
Transfer of Software & Licensing	Ian Barham	Information shared with John Spiers		Jan-24	Jan-23 No
Staff / Cultural Integration					
Meet the Team Sessions	Transition Group			Feb-24	Mar-24 No