



Delegates please ensure that all workers on your site or branch get a copy of this update
Westpac
23 September 2009

Branch Restructure Update – Finsec members speak up!

KEY POINTS:

- Delegates met last week to strategise our response to Westpac's branch restructuring proposal. We have made a comprehensive written submission to the bank, and the recommendations are included in this update.

ACTION:

Delegates please ensure staff at your worksite receive a copy of the update.

Delegates flock to restructuring meetings

Last week Finsec delegates from across the country came together to discuss Westpac's proposed new Branch Model. Huge numbers of delegates attended these meetings to give their views on behalf of their branches, and this was supplemented by many branches sending written feedback to Finsec.

Our principles for the restructuring

This strong member participation has enabled us to speak up with a strong voice. While there are a range of views within our membership about whether the proposal is a good or bad thing, there are some core principles that we all agree on, and which were endorsed at delegate meetings. These principles are:

- 1) Westpac must consult with staff properly about their plans.
- 2) Staff have to be given adequate training and support if their roles are changing.
- 3) The change has to be managed fairly. Staff should not be forced into roles against their wishes.
- 4) The proposal should not be used to reduce staffing numbers.

We are taking a realistic and pragmatic approach to the bank's proposed changes. We know that change will happen, but we will fight hard to ensure that staff are listened to and treated fairly. So far, the evidence is not

good. Westpac has not supplied good information to staff and the process is being rushed.

Our submission

We take our role representing the interests of members seriously, so we have prepared a detailed nine page submission to Westpac based on all of the member feedback we received. You can view the full submission at: <http://www.finsec.org.nz/Westpac/2009/Branch%20Re-Structure%20Submission.pdf>

On the page following this update are the sixteen recommendations we have made to Westpac in our submission.

Next steps

Finsec members have made their voices heard so far because we have been organised and active. We need to keep this up. Talk to non-union members at your site about joining up now so that they too can have a voice at this important time.

Finsec has a meeting with Westpac later today to discuss their plans now that they have received staff feedback. We will be in touch shortly to update you on the outcomes of this meeting. Please contact your Union Councillor or local Finsec office with any questions in the meantime.

Finsec Recommendations to Westpac about Proposed Branch Operating Model

The following recommendations have been made to Westpac as part of a detailed submission to the bank. The submission and recommendations are based upon feedback received at Finsec delegate meetings, and faxed back feedback from sites. You can view the whole submission at:

<http://www.finsec.org.nz/Westpac/2009/Branch%20Re-Structure%20Submission.pdf>

- 1) *That the timeframe for moving to implementation be slowed down on the following basis:*
 - *Westpac to confirm its overall intentions as per the existing timeline.*
 - *The month of October to be used for further dialogue with staff and Finsec to work through outstanding issues and questions.*
 - *Training to commence on the initial roll-out sites from November, with full implementation on these sites to be delayed until an appropriate time in the early New Year.*
- 2) *That the up-skilling and training of staff into new roles be made a priority and that the following measures be enacted to this effect:*
 - *That in consultation with staff and Finsec, Westpac develop an integrated training plan during the month of October that clearly sets out how Westpac will address the significant training needs created by the proposal.*
 - *That as a part of the implementation process, a minimum two week target-free training period be implemented during which staff are able to learn from one another on the job.*
- 3) *That the issue of how competency pay and the proposed new model intersect be worked through during the month of October, and that a meeting of the Westpac/Finsec Joint Review Committee be convened.*
- 4) *That until issues relating to Competency Based be are resolved, that staff working in roles under the new model be treated as "overall competent" for the purposes of pay progression.*
- 5) *That Westpac make a commitment to not force staff to shift into roles against their wishes.*
- 6) *That Westpac make a commitment to not shift staff around branches against their wishes, solely for the purpose of implementing the new branch model.*
- 7) *That in the first instance, Westpac seek and accept volunteers to shift into new roles.*
- 8) *That Westpac consider rolling out the new model on an Area by Area basis in order to more realistically match staff preferences with bank needs.*
- 9) *That during October Finsec and Westpac meet to establish a fair and reasonable process for transitioning branch staff from the previous model to the new model.*
- 10) *That Westpac confirms that it does not intend to reduce overall headcount in the branches through the course of this re-structure.*
- 11) *That Westpac provides further information on the extent to which it envisages the proportion of service staff to sales staff might change under the new model.*
- 12) *That Westpac consult with Finsec about proposed targets for the new roles at the next Targets Forum on 2 October.*
- 13) *That Westpac adopt a cautious approach to the initial striking of targets, and reviews after one quarter of operation.*
- 14) *That some broad principles as to best practice branch layout for the new model be developed, and that consideration of this be part of implementation plans at site level.*
- 15) *That Westpac further considers the queuing issues that may be created by the new branch model, and considers options for resolving this issue, including a greater provision of dedicated Tellers.*
- 16) *That during October there is further dialogue about the operation of the LC role, focusing on how it will operate across the whole range of branch situations.*