



GRIEVANCE INVESTIGATION REPORT

EMPLOYEE NAME:	IRRELEVANT	ID NUMBER:	
LOCATION:	Home Based	GRADE:	IRRELEVANT
JOB TITLE:	IRRELEVANT	TEAM:	Remediation Unit
CONTACT NO.		CONTACT EMAIL:	

INVESTIGATING MANAGER:	Nic Marriott	ID NUMBER:	
CONTACT NO.	GRO	CONTACT EMAIL:	GRO
DATE GRIEVANCE RECEIVED:	19 th December 2023		

INTRODUCTION & BACKGROUND

IRRELEVANT raised a grievance on 19th December 2023 citing the following concerns:

1. Bullying and harassment on the part of Simon Recaldin including misogynistic and passive aggressive behaviour
2. Concerns over the intention to replace all permanent employees pre-existing Simon's appointment, with a team of contractors all of whom he has previously worked with
3. Concerns over value for money in the set up of the RU leadership team given the appointment of numerous contractors within the function without clearly defined roles and responsibilities / deliverables

The complaint consisted of the following specifics:

- Appointment and scope of role of James Rawling
- Appointment and scope of role of Nigel Clibbens, and difference in treatment including more regular one to ones with Nigel, and Nigel being recognised for success but not being held accountable for performance
- Simon not liking challenge and referring to 'you challenge me so much you make me weary' and excluding from forums e.g. exclusion from the Past Roles activity and Resourcing Committee
- Inappropriate reference to GRO and being used to justify performance concerns when in fact this was more likely as a result of a significant personal situation that exposed IRRELEVANT during that period to a higher likelihood GRO
- Removal of budget accountability from scope of IRRELEVANT
- Failure to recognise the Operational / GLO teams from Simon despite requests to do so and despite recognition across other members of the team
- Response to sharing papers that had only been 'discussed' with DBT and the difference in tone when it was established this was Nigel Clibbens
- Inconsistent treatment of IRRELEVANT as a female employee in relation to resourcing, inability to recruit and increased process for IRRELEVANT vs Chris Russell
- Direct challenge from Simon regarding anonymous WOW feedback provided by IRRELEVANT which was bought up and addressed with her during her own Performance Review meeting



- Change in job title on a Board paper intentionally sanctioned by Simon Recaldin to belittle [RELEVANT]
- Allegation of sexist language suggesting prior to a meeting with DBT that 'you should let Nigel speak as he has more gravitas than you'
- Approach to daily stand up calls to [RELEVANT] **IRRELEVANT**
- Passive aggressive behaviour from Simon including comments of 'setting [RELEVANT] up for success' and pushing for Nigel to attend all meetings 'for the success of the project' as well as feedback that [RELEVANT] is 'unable to accept help'
- Simon sharing [RELEVANT] reason for absence in an email trail with others despite being asked to keep it confidential
- [RELEVANT] **GRO** in the mid year performance review due to not being willing to score an individual within [RELEVANT] team as a [RELEVANT] **GRO**
- Inappropriate feedback in PDR as a result of the management of Past Roles, and the inappropriate nature of the conversation between Simon and Alicia where it was perceived that Simon blamed the situation on [RELEVANT] and agreed she had mismanaged the situation
- Sexist comment from Richard along the lines of 'you look like you would be better at typing than me'
- Inappropriate delay in the SRR compensation programme

[RELEVANT] stated during the grievance hearing and reconvened grievance hearing that her desired outcomes were:

- To be able to return to work into a safe environment where she feels valued for the job she does
- Amendment of her mid year performance review rating: [RELEVANT] **GRO**
- Transfer back into her substantive position of: [RELEVANT] **IRRELEVANT**

METHODOLOGY

In accordance with the Grievance Policy, I have conducted formal grievance hearings and investigation meetings with individuals who have been identified as potential witnesses. I have interviewed 14 individuals, a blend of permanent colleagues and contractors. In accordance with the Grievance Policy all individuals interviewed as part of the process have had visibility of their meeting notes. Below outlines the timeline of events:

- Wednesday 3rd January – Formal Grievance Hearing with: [RELEVANT] **IRRELEVANT**
- Thursday 18th January/ Friday 19th January/ Monday 22nd January – Grievance Investigation Hearing with Simon Recaldin (Remediation Unit Director)
- Monday 22nd January – Grievance Investigation meeting with Chris Russell (Interim Data Management Director)
- Monday 22nd January – Grievance Investigation meeting Julia Marwood (People Director)
- Tuesday 23rd January – Grievance Investigation meeting with Pam Heap (Remediation Unit Escalations Director)
- Thursday 25th January – Grievance Investigation meeting with Neil Davey (Remediation Unit Finance Director)
- Thursday 25th January – Grievance Investigation meeting with Tim McInnes (Strategy & Transformation Director)
- Thursday 25th January – Grievance Investigation meeting with Evelyn Hocking (Programme Manager – Contractor)
- Monday 29th January – Grievance Investigation meeting with Ruth Griffiths (Project Manager – Contractor)
- Monday 29th January – Grievance Investigation meeting with Pavandeep Dhani (Technology Finance Director)



Monday 29th January- Grievance Investigation meeting with Nigel Clibbens (Head of Strategy & Reporting – Contractor)
 Monday 29th January – Grievance Investigation meeting with Jamie Tebbutt (Head of Finance – Remediation Unit)
 Tuesday 30th January – Grievance Investigation meeting with Victor Turner (Project Accountant – Contractor)
 Wednesday 31st January – Grievance Investigation meeting with Jackie Lawrence (Senior Data Protection Manager)

In addition to the above interviews, the following documents were received and reviewed and have been taken into consideration in coming to my decision as detailed below.

Emails and Attachments:

6th Feb 2024 – Jamie Tebbitt 'GLO Monthly Monitoring'
 5th Feb 2024 – Emily Best – confirmation of 3 grievance cases relating to appeals of PDR scores issued by [IRRELEVANT]
 8th Sept 2024 – Johann Appell 'PM Development Project Assurance Report'
 2nd Feb 2024 – Matthew Atkinson – Legally Privileged – Attachment contained legal advise re SRR deductions of wage types – marked legally privileged dated 2023.06.30
 2nd Feb 2024 – Mel Park teams message confirming PM's now suspended are paid gross REM over an average 12 month period but referring to Tracy Marshall to check this
 2nd Feb 2024 – Tracy Marshall teams message confirming PM's now suspended are paid gross REM averaged over a 12 month period
 30th Jan 2024 – Claire Hamilton – HMU Investigation Report
 30th Jan 2024 – Neil Davey email titled Supporting Material containing 4 attachments

- Supplementary estimates
- HSS Risk
- Resource Forum
- Post Office: Scoping Documents

29th Jan 2024 – [IRRELEVANT] – Panel Teach in on POL Shortfall
 26th Jan 2024 – [IRRELEVANT] email – requesting interview of Jackie Lawrence
 25th Jan 2024 – Pam Heap email ref Sarah Lambert
 23rd Jan 2024 – Simon Recaldin email including attachments:

- GLO working party and resourcing
- 2023-12-14 weekly SR MI pack
- 2023-09-21 weekly SR MI pack
- 2023-09-28 weekly SR MI pack
- 2024-01-04 weekly SR MI pack
- 2023-10-05 weekly SR MI pack
- 2023-11-23 weekly SR MI pack

19th Jan 2024 – FW [IRRELEVANT] Appraisal – Everybodys Conversation document
 10th Jan 2024 – [IRRELEVANT] email with x 4 attachments: IP process
 9th Jan 2024 – [IRRELEVANT] email – Re:GLO disclosure dated 26th June 2023
 9th Jan 2024 – [IRRELEVANT] email FW: Readout from DBT SteerCo on SRR temporary postmaster case and scheme restart
 9th Jan 2024 – [IRRELEVANT] email FW:Objectives
 9th Jan 2024 – [IRRELEVANT] Email Re [IRRELEVANT] – relates to impact of not having the ability to recruit
 9th Jan 2024 attachments: Everybodys Conversations and [IRRELEVANT] detailed 360 report
 3rd Jan 2024 – FW: In confidence conflicts of interest (HM)



5th Feb 2024 – FW GLO Bill
12th Feb 2024 – Victor Turner: Re: RU Investigation

I discussed the findings with [IRRELEVANT] on 15th February and during this discussion in addition to confirming the outcome, I explained that given the sensitivities relating to this case and to the nervousness on the part of some of the witnesses, I would reference relevant sections in my findings but would not be disclosing any supporting evidence in full.

FINDINGS

I will refer to findings in relation to each of the specific concerns detailed above.

1. Bullying and harassment on the part of Simon Recaldin including misogynistic and passive aggressive behaviour

I have found no evidence supporting a view of sexist or misogynistic behaviour on the part of Simon Recaldin. No witnesses corroborated this perspective and I was unable to validate any specific examples raised by [IRRELEVANT] in relation to this over the course of the investigation. My findings are despite both generic questioning of all witnesses on the culture of the function, whether they have witnessed any inappropriate behaviour on the part of any of our RU leaders and also specific questions on whether they have witnessed sexist behaviour and where relevant witnessed any specific examples provided.

The inconsistent approach to resourcing resulting in different treatment of [IRRELEVANT] to Chris Russell was the result of finance intervention due to not having a signed contract for funding relevant to GLO. A number of resources had already been signed off at risk and Neil Davey provided a statement to confirm he was the decision maker in refusing approval in this case despite repeated pressure from Simon Recaldin to provide the support [IRRELEVANT] was asking for. Simon's push for this resource to be approved was also despite his concerns that he was not getting to the bottom of true resourcing requirements, a concern shared by other witnesses present during daily stand up calls (including at least two POL employees outside of the RU contractors within the leadership team).

I believe the behaviour demonstrated by Simon falls short of bullying and in some cases is the result of genuine concerns over [IRRELEVANT] performance that are exacerbated by feedback from other Senior employees on Simon first joining the business and have been referenced by other witnesses. There is evidence to demonstrate that Simon has defended [IRRELEVANT] against challenge from stakeholders outside of RU in a manner consistent with how he treats the Contractors within his leadership team. He also refused to mark down [IRRELEVANT] end of year performance rating on first joining the business, despite pressure from his Manager given their concerns over [IRRELEVANT] performance.

However, there are specific examples provided by [IRRELEVANT] that the investigation has validated and I am concerned at the impact of the environment that has been created in RU, on [IRRELEVANT] and others, that has been referred to by multiple witnesses as 'clique', 'insiders and outsiders' when it comes to the Contractor team Simon has resourced versus existing POL employees and POL support function employees. I do not believe this environment is appropriate or conducive to effective performance. Additionally, witness statements have supported a view that Simon and some of the contractor population within the RU leadership are not open to challenge and do behave in a passive aggressive manner when challenged, with examples provided of defensiveness, eye rolling, visible frustration and then excluding relevant parties from further involvement in issues.



I am further concerned by what I believe to be a lack of self-awareness on Simon's part of the impact of his behaviour and leadership approach. In addition to the culture of us and them within his own leadership team, one specific example of this is the approach to challenging [IRRELEVANT] during her performance review meeting based on anonymous feedback she had provided to Simon in support of his own review, which he accepted he had done and which I believe was ill judged and inappropriate.

Another example is the open discussion of performance issues with [IRRELEVANT] peers and the undermining of [IRRELEVANT] contribution (whether valid or not), which has been evidenced over the course of the investigation. In relation to the investigation a comment was made by Simon of 'GRO walked in to around 18 grievances' in the context of her picking up [IRRELEVANT] area. This is wholly inaccurate with only 3 grievances being raised all of which related to PDR scores of individuals within the team of the two Team Leaders who were off work sick (predominantly as a result of the handling of the Past Roles issue within the team). This type of narrative that has been discussed with [IRRELEVANT] peers, whether believed to be true by Simon or not, undermines [IRRELEVANT] to others and is based on inaccurate assumptions.

2. Concerns over the intention to replace all permanent employees pre-existing Simon's appointment, with a team of contractors all of whom he has previously worked with

I do not believe that Simon has demonstrated an intent to replace all permanent employees with contractors he has previously worked with. My investigation determined that Simon was given a mandate on joining the business, and part of his recruitment was based on the desire from the business for him to bring in experienced Remediation resources to underpin the function with experience and capability in this space. The allegation is also inconsistent with treatment of other permanent members of the RU team.

There is a perception of Simon recruiting 'mates'. The investigation has found no evidence to support any relationship between Simon and the contractors recruited into the function beyond long standing professional relationships. However, examples have been provided of very close personal relationships between some of the contractors themselves.

I believe that Simon has genuine concerns over [IRRELEVANT] performance that has resulted in the approach he has taken to bring in additional resources to support. However, I do feel that the execution of this support and the management of performance concerns has been ineffective.

3. Concerns over value for money in the set-up of the RU leadership team given the appointment of numerous contractors within the function without clearly defined roles and responsibilities / deliverables

Whilst Simon is operating based on a mandate to equip the function with experienced and capable Remediation resources, the investigation has highlighted that the execution of this has been reactive and not well planned against a formal organisational design or resource plan.

There are ongoing concerns from numerous witnesses about the extent to which all resources within the Lead team are fully utilised, and regarding clarity of deliverables, roles and responsibilities. Whether the business gets value for money out of how the leadership team has been constructed and resourced has been raised as a question by a number of witnesses and this is an area that I believe requires further review.



Concerns have also consistently been raised regarding the management of the RU Resource Committee which has heavy Contractor involvement in extensions and review of rates of other contractors. This process also requires further review.

In relation to the specifics my findings are as follows:

- **Appointment and scope of role of James Rawling**

James was appointed with no clear scope of role or deliverables other than to take a look and help IRRELEVANT GRO. The initial scope of James' remit would have undermined the existing structure in the RU within the Operations space which was IRRELEVANT accountability and the type of resource bought in was not aligned to IRRELEVANT ask for additional support which was in the project space.

The ability to reallocate James when the appointment and scope of role was challenged indicates the requirement was unclear and unnecessary at the point of appointment and the use of words like 'he is no threat to you' from Simon, which he accepted he said, is likely to have resulted in concern from IRRELEVANT that this was the case.

A witness has confirmed that towards the end of his contract with Post Office and prior to leaving of his own volition, James himself was frustrated and uncomfortable that he was underutilised both in relation to the level of activity he was involved in in comparison to his experience and in the volume of work.

- **Appointment and scope of role of Nigel Clibbens, and difference in treatment including more regular one to ones with Nigel, and Nigel being recognised for success but not being held accountable for performance**

Similar to James, Nigel was appointed with no clear deliverables or scope of role and the extent to which his responsibilities have changed over the course of his contract is a further indicator of this, including the desire to use him as Finance Director within the function rather than utilising the POL Finance support function. Whilst I accept that roles and requirements do evolve over time and in light of changing business needs, evidence points to a lack of a clear organisational design or resource plan in how activity should be delivered within the function.

Despite using statements such as 'he is no threat to you' the lack of clarity of deliverables and Nigel himself stating that he is there to help whether IRRELEVANT likes it or not, is not conducive to effective working GRO. Simon was unable to articulate a clear scope for Nigel despite an ask from IRRELEVANT to do so and I do believe this served to undermine IRRELEVANT role and her relationship with Simon.

There is evidence to suggest that whilst Nigel played a role and was in place to support IRRELEVANT at the time the mistake was identified with SRR, Nigel was not held to account in the same way as IRRELEVANT and instead went on to lead the remediation of the issue.

- **Simon not liking challenge and referring to 'you challenge me so much you make me weary' and excluding from forums e.g. exclusion from the Past Roles activity and Resourcing Committee**



Witness statements have supported a view that Simon and some of the contractor population within the RU leadership are not open to challenge and do behave in a passive aggressive manner when challenged, with examples provided of defensiveness, eye rolling, visible frustration and then excluding relevant parties from further involvement in issues. This is consistent with [IRRELEVANT] experience reported through the grievance.

- **Inappropriate reference to [GRO] being a sign of [GRO] and being used to justify [GRO] when in fact this was more likely as a result of a significant personal situation that exposed [IRRELEVANT] during that period to a higher likelihood of minor [GRO]**

Simon and Nigel Clibbens both acknowledged that [IRRELEVANT] went through a period of [GRO] and expressed similar concerns as to her wellbeing. I believe that Simon's concern for [IRRELEVANT] wellbeing was genuine but there is evidence that this was discussed openly within the RU contractors within the lead team – with a lens of concern for [IRRELEVANT] but without all relevant information. I accept [IRRELEVANT] perspective and acknowledge that Simon's assumptions around stress at work contributing to illness was misplaced. However, I do not believe it is not an unreasonable conclusion to draw in the context of a stressful working environment and an individual working long hours and believe it would be appropriate for Simon to query this one to one with [IRRELEVANT]

It was not appropriate on Simon's part to assume this evidenced a performance concern. However this could have been mitigated with increased openness from [IRRELEVANT] regarding her personal situation, and Simon may have assumed in his role of Line Manager that [IRRELEVANT] would be open around such issues. I do however accept it is [IRRELEVANT] right not to disclose personal circumstances particularly in the context of a relationship with her line manager that was already strained.

- **Removal of budget accountability from scope of [IRRELEVANT]**

There seems to be no apparent rationale other than for an offer of help, that was not requested, as to why budget accountability would be removed from the scope of role of a Senior Leader within the business. This was challenged by [IRRELEVANT] at the time to no avail. I do believe this was based on Simon's [GRO] which was articulated openly by a witness as part of the investigation. Simon also articulated the need for pace in the activity and already had concerns over progress against the context of a red scorecard.

However, there was no formal feedback put to [IRRELEVANT] at the time to support this and no offer of guidance or counsel that I have been made aware of for how to address any perceived concerns. I therefore believe that it was inappropriate to reallocate accountability of an individual into a Contractor on this basis without any formal employment process being followed.

- **Failure to recognise the [IRRELEVANT] from Simon despite requests to do so and despite recognition across other members of the team**

Simon acknowledged during his meeting that he likes to drive pace and is very delivery focussed in mindset which at times means his recognition is not as good as it should be. He explained that he treats all teams within the function consistently in this regard but that it may appear less frequent in [IRRELEVANT] area due to the size of the team. Feedback from witnesses does tend to suggest that there is less recognition in [IRRELEVANT] areas and that she does appear to be treated differently at times, however it is important to note that where this is implied, the reason for that difference in treatment is



understood by witnesses to be because of issues

GRO

GRO

- **Response to sharing papers that had only been 'discussed' with DBT and the difference in tone when it was established this was Nigel Clibbens**

The tone of emails in relation to this issue from Simon is initially high challenge and this does appear to change when Nigel acknowledges he shared the documents and made the decision. However, it is impossible to determine whether the same response would have been provided from Simon had [IRRELEVANT] been responsible for the issue.

- **Inconsistent treatment of [IRRELEVANT] as a female employee in relation to resourcing, inability to recruit and increased process for [IRRELEVANT] vs Chris Russell**

The inconsistent approach to resourcing resulting in different treatment of [IRRELEVANT] to Chris Russell was the result of finance intervention due to not having a signed contract for funding relevant to [IRRELEVANT]. A number of resources had already been signed off at risk and Neil Davey provided a statement to confirm he was the decision maker in refusing approval in this case despite repeated pressure from Simon Recaldin to provide the support [IRRELEVANT] was asking for. Simon's push for this resource to be approved was also despite his concerns that he was not getting to the bottom of true resourcing requirements, a concern shared by other witnesses present during daily stand up calls (including at least two POL employees outside of the RU contractors within the leadership team).

- **Direct challenge from Simon regarding anonymous WOW feedback provided by [IRRELEVANT] which was bought up and addressed with her during her own [IRRELEVANT] meeting**

Simon acknowledged during this meeting that he did address the feedback [IRRELEVANT] anonymously provided during her PDR and there is reference to the breakdown in their relationship within [IRRELEVANT] Everbodys Conversations document. The WOW feedback process was communicated as an anonymous process to reassure employees that they could provide honest and open feedback without fear of reprisals. In this context it was inappropriate and ill-judged for Simon to raise this with [IRRELEVANT] at all and not least within her own PDR meeting and I do believe the manner in which it was raised was passive aggressive in nature.

- **Change in job title on a Board paper intentionally sanctioned by Simon Recaldin to belittle [IRRELEVANT]**

The investigation found no evidence to support this specific allegation. Evelyn Hocking confirmed that this was an error on the part of one of the team because at that point [IRRELEVANT] [IRRELEVANT] role and it was therefore perceived that [IRRELEVANT] had moved across [IRRELEVANT] and would therefore have a different job title. This was ultimately corrected when challenged but I believe stemmed from a lack of understanding of the nature of [IRRELEVANT] move across [IRRELEVANT] as temporary.

- **Allegation of sexist language suggesting prior to a meeting with DBT that 'you should let Nigel speak as he has more gravitas than you'**

The investigation found no evidence to support this specific allegation.



- **Approach to daily stand up calls to [REDACTED] IRRELEVANT**

There is evidence that this approach is standard when wanting to deal with issues across the RU and was applied no differently to the [REDACTED] than it has been in other areas of the function. Several witnesses were asked whether the tone and approach during these meetings was ever inappropriate, to which the large majority said it was not. There was a general acceptance that the meetings were high challenge and that frustrations were visible on the part of Simon and others at times. However, there was also a view that [REDACTED] came across as unprepared, inconsistent and unable to answer questions regarding numbers and requirements and that this, along with repeated failures on consecutive days to deliver specific actions, led to these frustrations. It is of course possible that the nature of the [REDACTED] GRO during these meetings.

One witness did refer to one of these meetings and felt that the behaviour from Simon towards [REDACTED] did cross the line into inappropriate on a single occasion and that it should have been handled in a 1:1. Another witness felt that whilst the meeting wasn't necessarily inappropriate, it was ill judged and badged as support when in fact it came across as overly challenging and directed solely at [REDACTED]. I believe this demonstrates poor judgement from Simon in not changing the approach to the support being offered / to get the bottom of requirements when it wasn't working and was resulting in frustration and tension.

[REDACTED] GRO and there is clear evidence that these concerns were shared by others (outside of the RU lead team of contractors). MI has also been provided by Simon which shows regular red status in relation to [REDACTED] compared to forecast and it is expected that Simon would need to intervene in such a scenario.

- **Simon sharing [REDACTED] reason for absence in an email trail with others despite being asked to keep it confidential**

Whilst the timing and wording of the email from Simon was unfortunate, having addressed this with him I am confident that his email had nothing to do with [REDACTED] absence but instead referred to the pressure being removed in its entirety due to the psychological impact of the deadline on activity being given flexibility.

- **Scoring of [REDACTED] in the mid year performance review due to not being willing to score an individual within [REDACTED] team as a [REDACTED] based on a single [REDACTED] GRO**

I do not believe that the score of [REDACTED] was given on a single incident and I am confident having discussed at length with Simon that he had genuine concerns [REDACTED] GRO that he had discussed with HR prior to the PDR meeting. The tone of the meeting and the behaviour of both parties was inevitably impacted by the discussion of the WOW feedback [REDACTED] had provided to Simon and him addressing this in that forum, which I do not believe was helpful in creating an open environment for two-way discussion and an opportunity to hear each others point of view.

Whilst there are examples provided that would create a cause for concern with regards to [REDACTED] GRO there is also misunderstanding in some of Simon's narrative in at least one instance relating to the taxation of payments, which was addressed separately by [REDACTED] with Simon but was not responded to.

The process around Past Roles has been complex and has been ongoing with numerous discussions at GE and only recently a confirmed process for managing this. No process or policy existed



regarding recruitment in relation to the risk of optics relating to those involved in activity subject to the Inquiry and the decision in resourcing at the time was more about ensuring the team had access to the knowledge and experience of individuals that could inform what happened in the past and enable effective management going forward. Whilst with hindsight this may have been inappropriate, and I would expect an understanding on the extent of the risk this generates for the business and for these individuals from [IRRELEVANT] now, it feels unreasonable to hold [IRRELEVANT] to account for historical decisions across the board that were made in a different operating context.

When it came to BT, it is understood by witnesses and by me in advance of this process, that HR failings were a significant contributing factor in how this situation unfolded and this may not be sufficiently reflected in Simon's understanding of the situation.

The investigation has been unable to evidence why a different approach to the conversation with Alicia was taken to those led by Pam in the Operational area. Witnesses present in the discussion where it was agreed this conversation would happen felt that the remit of the discussion was to explain the perceived risk as opposed to discussing redeployment directly and Simon also articulated this perspective. Despite this, I do not believe it was necessary for Simon to leave Alicia with the impression that [IRRELEVANT] was to blame for the impact on her of the situation and feel this could have been managed differently to mitigate the impact to the individual without undermining [IRRELEVANT] role in the process – particularly without any prior discussion from Simon with [IRRELEVANT] and without him seeking to understand her perspective.

The reallocation of accountabilities and workload, the environment of us and them, the response of Simon and some of the lead team to challenge and the clear breakdown in relationship between [IRRELEVANT] and Simon, the significant impact of which on [IRRELEVANT] have witnessed first hand, are also not conducive to a [IRRELEVANT] **GRO** [IRRELEVANT]

- **Sexist comment from Richard along the lines of 'you look like you would be better at typing than me'**

The investigation found no evidence to support this specific allegation. The witness referred to in [IRRELEVANT] grievance meeting was unable to recall such a comment.

- **Inappropriate delay in the SRR compensation programme**

There is evidence that practices in relation to SRR following a significant delay in making payments, now differ from practices established within HSS and BAU and at odds with legal advice and the view I have seen direct from DBT on the compensation principles that should apply and the approach they are willing to fund, i.e. mitigate operational expenses and where there is a question mark take a view in the favour of the Postmaster. Given concerns raised by multiple stakeholders as to the timeliness of the scheme and the approach now being taken, and in light of my initial findings above, this has now been escalated to A&CI for further investigation.

DECISION



Based on the above I partially uphold the grievance and support the required outcomes **IRRELEVANT** stated in her grievance hearing and reconvened grievance meeting which are:

1. Transition back into the full scope of the **IRRELEVANT**
2. Amendment of the half year PDR score **GRO**
3. Return to being valued in role in a safe working environment

In seeking to ensure point 3, further recommendations are detailed below on actions required to further investigate / address the findings detailed within this report.

RECOMMENDATIONS

1. Plan to be established between Simon Recaldin and HRD / ER to transition **IRRELEVANT** back into the full scope of her substantive **IRRELEVANT** Consideration needs to be given as part of this to managing the interim incumbent and the appropriate handover of the **IRRELEVANT**
2. A clear set of performance objectives to be agreed between Simon, **IRRELEVANT** and HR to ensure clarity of expectations of all parties such that any **GRO** concerns can be identified and appropriately managed
3. Amendment within Success Factors of the half year PDR score from **GRO**
4. Mediation between **IRRELEVANT** and Simon to be managed by an independent third party. Prior to the conclusion of this exercise **IRRELEVANT** will maintain a touchpoint with myself in the format of a buddy / independent point of escalation or mediation as required
5. Escalation of concerns raised regarding the delay in the SRR scheme for further investigation by the A&CI function
6. Full review by an independent HR lead of the RU organisational design starting with the construction of the leadership team scope, roles and responsibilities and deliverables
7. Full review by an independent HR lead of all contractors within RU aligned to the above OD review, starting with the RU leadership assessing deliverables, expected duration of role, length of service and IR35 status
8. Review by an independent HR lead of the RU resource committee terms of reference and approach to management of the process.
9. Further recommendations / action affecting other employees / contractors referenced within the grievance will be documented and managed with them separately as appropriate

MANAGER SIGNATURE:		DATE:	
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