

Confidential

Witness Statement

Name: Kelsey Barnes
Occupation: Client Finance Officer
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

I have been appointed as the investigating officer in relation to an allegation regarding concerns over the unacceptable attitudes towards other staff on the team and within management by Ian Barkley.

The purpose of today is to obtain further information in relation to the allegation(s) which may potentially lead to a hearing under the Disciplinary Procedure.

I have some questions that I would like you to respond to as a witness to part of the allegations raised against Ian. You will have the opportunity after the questions to add anything further in relation to the matter under investigation.

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	KB	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	KB	<p>Yes, mostly taking short cuts with things, he always uses the term 'using my discretion' but it shouldn't be like that when involving finances. If you are not willing to do things his cool way you are made to feel bad by Ian. There are a lot of negativities all of the time, I feel like I am always being listened to by Ian, for example when I finish a call, he will start to question me about the responses I have given.</p> <p>I have learned some things from Ian and then I have helped others in the team with this knowledge, after I have shown other team members our ways of working, when they have been asking follow up questions, Ian has said don't ask Kelsey, she does not know what she is doing and it will be wrong.</p> <p>He does this out loud so others can hear it. It makes me feel foolish.</p> <p>Another example is, I did some training with Ian and I took notes to write the guides for other colleagues. He watched me writing the notes and knew that I had finished the 'credit note guide' for others to follow. Keith was going to use the guide and Ian said, No, don't use that there will be something wrong with it. This being 3 weeks down the line and its upsetting for him to be raising things like that in front of people.</p> <p>I sent him an email that was a simple request, but Ian challenged my email out loud, he was being pedantic, it was as simple as a word in the email he pulled me up on. Lots of people heard including Claire, I was made to feel foolish.</p> <p>We do a financial update assessment and Ian has made comments and digs at me about how badly it has been done. I have been stressed with the work and instead of supporting Ian has just said about how badly I have done the work.</p> <p>Even though I do a good job, Ian will always challenge me and say something has been done wrong. Claire, Wendy and Ben have heard him challenging me, on more than one occasion.</p> <p>In team meetings we are all proactive giving ideas, but Ian dismisses all our ideas and is constantly chipping away, being negative, being disruptive.</p>
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	KB	Yes, when Ian came, he was then and still is, defiant towards his manager, he is difficult and there is an awkward atmosphere, and it feels like he does and says things on purpose. He is patronising and overcomplicating things to intimidate.

		<p>He is dismissive of Sophie and any of her ideas, he can be patronising to Wendy who I manage, he can overcomplicate things to make things difficult. There is an atmosphere in the office.</p> <p>I don't think I ever heard him be disrespectful with the males in the team.</p> <p>I can get on with Ian having conversations not about work but when it is about work Ian is challenging.</p> <p>Keith asked Ian for support because Ian does not behave like he does with me, with Ben and Keith. But, Ian has given me incorrect information before, and I have advised customers incorrectly so I don't go to Ian anymore. So, I don't think he should be supporting Keith as Sophie is his manager.</p>
Q4	MWV	Have you raised your concerns regarding Ian's behaviour?
	KB	Yes, to Sophie. Sophie knows I get frustrated as I feel I am targeted.
Q5	MWV	What does Sophie say regarding you being frustrated?
	KB	Sophie says she will pick it up in supervision and ask him about things.
Q6	MWV	Anything else you want to add to the questions today?
	KB	<p>Ian and I are on the same grade. When Ian was at brokerage, he knew everything. I don't think Ian is happy that a 25-year-old girl is now doing the same job as him.</p> <p>Ian uses 'his discretion' and does not follow our processes. If a contribution is less than £2, Ian says not to raise the contribution as we don't generate an invoice as invoices cost more but there still needs to be something done. There is a procedure for this and if it is not followed it impacts on the customer and may add to their payments unsuspectedly. Ian does not follow our process.</p> <p>The small things that happen cause bigger issues. I worry about things not being done properly.</p> <p>I feel he does not want to be part of the new structure and he does not want to do assessments.</p> <p>Whilst Ian has been off there has been a different atmosphere in the office because Ian always has to have that little bit to say, putting everyone on edge.</p> <p>Sometimes he can be really helpful but mostly you don't know what Ian you are going to get.</p>

I confirm that this is a true and accurate account of our discussion.

Date: 18/10/2022

Signed: Kelsey Barnes

Confidential

Witness Statement

Name: Lynsey Marsh
Occupation: Court of Protection Case Officer
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	LM	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	LM	No
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	BS	<p>No.</p> <p>I have worked with Ian for a long time, Ian has not changed. Ian is helpful. But I don't have interaction with Ian.</p> <p>Sometimes in my opinion Ian's manner can be abrupt, but I know Ian it does not offend me.</p> <p>I have not witnessed Ian aggressive or rude to anyone. I have heard Ian in the office but not challenging. It is just Ian's manner and approach, it could be seen by others as his manner is disrespectful.</p> <p>Its Ian's way but I can see his approach could be taken the wrong way.</p> <p>I have known Ian a long time and Ian has not changed.</p> <p>We have only been together again a matter of months and Ian is Ian.</p> <p>I have not witnessed anything that is untoward in the office.</p> <p>It is so busy and I am not paying attention, I do my work.</p>

I confirm that this is a true and accurate account of our discussion.

Date: _____

Signed: _____

Confidential

Witness Statement

Name: Keith Miah
Occupation: Client Finance Officer
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	KM	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	KM	No, I have not witnessed any issues
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	KM	No, I have not seen anything, I have not seen any issues with management although there can be some tense issues, mannerisms with management so you can see there is tension. The tension does not affect me. I don't think it affects the team. No one has discussed or raised issues with me about Ian. Ian joined in April 2022 to the team.
Q4	MWV	In team meetings do you feel Ian can be challenging?
	KM	I don't recollect a time that Ian is challenging. Ian has opinions it's reasonable to share that. I get on well with Ian and he is helpful. Ian is always there to support. My personal observation is Ian is very helpful there is tension with management but no other staff have raised anything to me or discussed any issues.

I confirm that this is a true and accurate account of our discussion.

Date: 30/11/2022

Signed: Keith Miah

Confidential

Witness Statement

Name: Ben Simmons

Occupation: Client Finance / Court of Protection Case Officer

Work Place/Location: Oldham Council

Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	BS	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	BS	There is disruption a little bit towards Sophie his manager, sometimes when we are having team meetings he can be disruptive, he does not need to be disruptive rather he should be constructive.
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	BS	<p>Towards Sophie, yes, but not disrespectful to others.</p> <p>He has been disruptive towards Kim Simister. There is work cross over and when Ian has been asked to do something he has been disruptive.</p> <p>It is always about ways that we work, Ian often states if it's not broke don't fix it, but there are procedural ways to work. When someone else tries to do work that Ian knows, there is always push back, unnecessary push back.</p>
Q4	MWV	Why do you think Ian pushes back?
	BS	<p>I think he likes to do things his way. Sophie stays calm but Ian does things his way.</p> <p>Ian says no to most ways of working but he should think about it instead, as there are reasons and needs behind our ways of working.</p>
Q5	MWV	Does the team work well together?
	BS	<p>There is one other member of the team that can be difficult but not with Ian.</p> <p>Generally, the team work well.</p> <p>We are trying to make the service more effective and better ways of working and we have work to do, there have been ideas about rota working but Ian had opinions and then says he will go with the flow and then Ian pushed back. For me I have work to do, in the meetings I think let me go and do my work and when you make decisions, let me know the outcome.</p> <p>I have gone to Sophie and Kim with ideas, and I don't think Ian gets that. This causes disruption in team meetings you are spending 20 mins that is not an issue as arguing for the sake of arguing.</p> <p>Ian is old school. If he knows you have more knowledge than him, he will show it against anyone male or female.</p> <p>Changes are difficult for Ian but working the ways of 20 years ago is not the way now, change needs to happen.</p>

		<p>Ian has a routine and Ian finds it easier to do it his way and other staff members may not do it that way, if he is asked to do it a different way by management, it can make Ian behave in a difficult way.</p> <p>Change is trying to be introduced but Ian is having difficulty to take the change.</p>
Q6	MWV	Do you think Ian respects management?
	BS	No, Ian respects anyone who is on his wavelength but if not then he is disruptive. With Ian it is if you agree with me then OK but if not then it's not the way he wants to work.
Q7	MWV	What is the team moral like?
	BS	<p>Ian has been off work and the team productivity has been up.</p> <p>Sophie has meetings with an agenda and while Ian has not been here the meetings has been productive without challenge. In meetings we get stuck on points with Ian and it gets to be in a discussion, I'm not saying Ian shouldn't have an opinion but some things could be handled differently by Ian. Ian likes to have the witnesses in meetings and pushes Sophie, but Sophie won't push back, Sophie keeps calm.</p>
Q8	MWV	Does Ian have involvement with other teams?
	BS	Ian has worked in brokerage mainly; I feel he cuts corners and does things his way. Ian did work when he moved over to client finance (contributions) but now wants to do work for the brokerage team that that team should do not our team.
Q9	MWV	How as it been since brokerage came here?
	BS	All OK I don't deal with brokerage. There had been issues about moving from Link Centre to the council. But it seems to be okay.
Q10	MWV	How has Ian been now the brokerage team have joined the same space?
	BS	<p>I have not noticed any change in Ian, I think he is a bit happier that previous colleagues have joined.</p> <p>I think Ian is just who he is and he does not like change.</p>

I confirm that this is a true and accurate account of our discussion.

Date:

27-10-2022

Signed:



Confidential

Witness Statement

Name: Rachel Skinner
Occupation: Assistant Caseworker
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	RS	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	RS	No, I have not witnessed any issues
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	RS	No, I have not seen anything, I have not seen any issues with management
Q4	MWV	Is there anything else you wish to add to the questions today?
	RS	My opinion is of Ian it's his personality, some people's personalities clash and Ian can clash with others.
Q5	MWV	Are you ever in meetings with Ian and do you feel the atmosphere was challenging in any way?
	RS	I am not in meetings with Ian.

I confirm that this is a true and accurate account of our discussion.

Date:

Signed:

Confidential

Witness Statement

Name: Michelle Thornhill
Occupation: Court of Protection Case Officer
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	MT	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	MT	No
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian towards colleagues in the office?
	MT	No, Ian was in the Army, he is the way he is. People could take offence to his straight-talking approach. I have worked with Ian many years and he is good at his job. Not heard anything in the open office.

I confirm that this is a true and accurate account of our discussion.

Date: 19/10/22

Signed: M Thornhill

Confidential

Witness Statement

Name: Claire Andrew
Occupation: Court of Protection Case Officer
Work Place/Location: Oldham Council
Date of Interview: 21 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

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	CA	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	CA	Inappropriate No, Unnecessary Yes. For me personally I intervened when he spoke to one of my colleagues. He appeared to be pernickety, it was over a plural in an email it was unnecessary. Pushing a point. It is just the way Ian is. He was seen to be making a point that was not needed, it was full on. This is within last 6 months.
Q3	MWV	How did Ian respond to your challenge?
	CA	Ian just left it. Didn't say anything. Ian was quiet afterwards. I said just talk to her nicely, it was Kelsey. He is OK with me.
Q4	MWV	Have you witnessed inappropriate behaviour towards management?
	CA	You can hear references to management it can be derogatory. It's unnecessary, in your face. Not how I would work.
Q5	MWV	Have you seen Ian being supportive within the team?
	CA	If you ask Ian to explain he would be there but in equal measures he has a lot of unnecessary questions. If someone has not got the personality to recognise its too much, Ian can be pedantic, it's his character.
Q6	MWV	Can you see any clashes in the client finance team?
	CA	Yes, we all appear okay as a team and we all do generally get on. Although sometimes it can be overbearing from Ian with things he is saying, that I have heard but not necessarily happening direct to me. When I challenged it was a one off that I felt I needed to mention.
Q7	MWV	How did Kelsey respond?
	CA	She did not really say anything. Ian can be overbearing, it's his character and he could have been addressed earlier but that does not appear to have happened.

I confirm that this is a true and accurate account of our discussion.

Date: 25/10/2022

Signed: C. Helnew

Confidential

Witness Statement

Name: Gill Lill

Occupation: Court of Protection Case Officer

Work Place/Location: Oldham Council

Date of Interview: 23 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

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	GL	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	GL	Unnecessary is the way he is in the office with people. You just think "Oh its Ian"
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	GL	It's been accepted for so long but it is unnecessary and his general demeanour is unnecessary and appears to be more towards females. I have worked with Ian before at Southlink and it has always been Ian's way we accept it.
Q4	MWV	How long did you work with Ian at Southlink?
	GL	Few years.
Q5	MWV	What is the current team moral like?
	GL	Team morale is brought down but I don't have any dealings with Ian as I choose not to deal with Ian in the office.

I confirm that this is a true and accurate account of our discussion.

Date: 19/10/2022

Signed: Gill Lill

Confidential

Witness Statement

Name: Wendy Whitehead
Occupation: Assistant Caseworker
Work Place/Location: Oldham Council
Date of Interview: 23 September 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

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Questions

Q1	MWV	In the invite you were afforded the right to be represented at today's interview and note you are unaccompanied. Are you happy to continue without representation?
	WW	Happy to continue.
Q2	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley in the office?
	WW	He comes across as a bit obnoxious and can be abrupt.
Q3	MWV	Have you ever witnessed any inappropriate behaviour or conduct from Ian Barkley towards a colleague?
	WW	Yes, he can be obstructive if you ask a question, he says I have my way, he does not participate and he is not on board with new working practices its just obstructive and disrespectful.
Q4	MWV	Do you feel Ian is aiming his behaviour toward anyone in particular?
	WW	No, sometimes he can be really nice, depends on the day.
Q5	MWV	Are you involved in Team meetings with Ian?
	WW	Last time he was quite rude and obstructive we were asked our opinions on better ways of working, moving forward with working practice. Ian says "I work different than anyone else he made it really difficult"
Q6	MWV	Does Ian's behaviour affect team morale.?
	WW	It can in team meetings we felt we were not getting anywhere. In other ways he can be helpful and has a lot of knowledge. I have not worked with Ian for long.
Q7	MWV	Can staff in the open office hear conversations taking place?
	WW	The whole floor can hear him.

I confirm that this is a true and accurate account of our discussion.

Date: 03/11/2022

Signed: Wendy Whitehead

Confidential

Statement

Name: Kim Simister

Occupation: Court of Protection Team Leader

Work Place/Location: Oldham Council

Date of Interview: 4 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

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Questions

Q 1	MWV	Can you confirm that you were afforded the right to representation and that you are happy to go ahead unaccompanied?
	KS	Yes
Q 2	MWV	Can you confirm your working relationship with Ian Barkley? Have you ever managed Ian in your role?
	KS	I work in same office with Ian he would come to me if he needed to.
Q 3	MWV	Can you advise if you have ever witnessed any concerns in Ian's behaviour towards other managers or staff members within the service? If so, can you provide any details?
	KS	<p>I have been here 7 months, if Sophie has not been here, I have been available for support. I find that Ian tries to get involved in work where he should not be.</p> <p>Example: I had an email query that I received 1 November 2022 which Ian had received on 14 October 2022. Ian did not forward the email. I don't know how many other emails Ian may be receiving and dealing with but he is not brokerage anymore he is client finance.</p> <p>Example: Something needed to be purchased for the Brokerage team and I asked Ian and he advised I can do it. I advised him it was not his role and I said send it to another colleague but Ian was dismissive and huffing and puffing about who to send the request to. Ian said it should be a senior or myself, but Ian is not on the brokerage and the request would not be just the seniors role.</p> <p>Interactions with Ian can be Jekyll and Hyde, he is not approachable.</p> <p>He is knowledgeable about his job, maybe he does not like that he has been moved from Brokerage.</p> <p>There is a fee uplift at the moment (November 2022) and Ian is approaching staff saying he needs information, but he does not need this information. I have instructed my staff not to give Ian any information this has had to be addressed.</p> <p>Ian can come across very intimidating.</p> <p>I feel that Ian tries to undermine decisions and following requests.</p>
Q 4	MWV	Have you heard Ian making any comments?
	KS	Ian can be flippant, he is awkward and I feel he goes out of his way to be awkward, He looks at you sometime like you have 10 heads. Sometimes he can be helpful.
Q 5	MWV	Have any of your teams come to you to report issues/concerns?
	KS	None of my team have reported any issues.

Q 6	MWV	Were you at the staff engagement this year did you witness any behaviour that Ian presented at the meeting?
	KS	Ian was on my table he made comments at the table, "we have heard all this before". It is like he feeds comments waiting for someone to bite. He does not come across to me to be positive he is negative.
Q 7	MWV	Do you believe Ian is a team player?
		No, I feel Ian would be disruptive, picking out issues to be awkward.
Q 8	MWV	Is there anything else you wish to add to any of the questions presented today?
	KS	I have not really had direct contact but personally sometimes he walks past you without looking at you and another day he can say hello.

I confirm that this is a true and accurate account of our discussion.

Date: 10.11.22

Signed: Kim Simister

Confidential

Statement

Name: Liz Taylor

Occupation: Senior Accountant

Work Place/Location: Oldham Council

Date of Interview: 4 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
HR Advisor to Investigating officer
Trade Union/Work Colleague

Introduction:

Thank you for attending today.

I have been appointed as the investigating officer in relation to an allegation(s) regarding concerns over the unacceptable attitudes towards other staff on the team and within management by Ian Barkley.

The purpose of today is to obtain further information in relation to the allegation(s) which may potentially lead to a hearing under the Disciplinary Procedure.

I have some questions that I would like you to respond to as a witness to part of the allegations raised against Ian. You will have the opportunity after the questions to add anything further in relation to the matter under investigation.

Following this process, a statement will be typed up and sent out to you to sign as a correct record of the discussions held. If you feel that you wish to make any amendments, then these can be attached. The statement provided may be used as part of any disciplinary hearing, appeal process or Employment Tribunal.

In the event of a formal Disciplinary process you may be required to attend any disciplinary hearing as a witness (if required).

Questions

Q 1	MWV	Can you confirm that you were afforded the right to representation and that you are happy to go ahead unaccompanied?
	LT	Yes
Q 2	MWV	Can you confirm your working relationship with Ian Barkley?
	LT	Ian is part of the team for invoicing for CHC & section 117's client care packages now and previously. I have met with Ian discussing health care, invoicing and recharges. Ian has now moved over to Sophie's team.
Q 3	MWV	Can you advise if you have ever witnessed any concerns in Ian's behaviour towards other managers or staff members within the service?
	LT	Ian is not the easiest person to work with, he can come across as aggressive at times. We have been in meetings and Ian was asked a question by Sophie and his answer was not directed back to her, he directed his response to someone else. I found that to be rude and dismissive.
Q 4	MWV	Have you ever experienced any concerns in Ian's behaviour towards yourself during any working relationship?
	LT	Not directed at me, I find him difficult to work with & I sometimes struggle to get a straight answer from Ian to any questions asked. When working with Ian I have to chase him on a number of occasions for a response. E.g. chased this week about a meeting on Tuesday with the CCG for an update, Ian was asked to give feedback and did not provide an update, had to email again and I have since had the information.
Q 5	MWV	How did Ian's behaviour towards you make you feel?
	LT	Ian's behaviour makes me feel uncomfortable.
Q 6	MWV	Is there anything else you wish to add to any of the questions presented today?
	LT	Ian's behaviour is the same irrespective of who is his manager is, he was the same with Angela as he is with Sophie.

I confirm that this is a true and accurate account of our discussion.

Date: 10th November 2022_____

Signed: Liz Taylor_____

Confidential Statement

Name: Kirsty Littlewood
Occupation: Assistant Director of Community Business Services
Work Place/Location: Oldham Council
Date of Interview: 4 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

I have been appointed as the investigating officer in relation to an allegation(s) regarding concerns over the unacceptable attitudes towards other staff on the team and within management by Ian Barkley.

The purpose of today is to obtain further information in relation to the allegation(s) which may potentially lead to a hearing under the Disciplinary Procedure.

I have some questions that I would like you to respond to as a witness to part of the allegations raised against Ian. You will have the opportunity after the questions to add anything further in relation to the matter under investigation.

Following this process, a statement will be typed up and sent out to you to sign as a correct record of the discussions held. If you feel that you wish to make any amendments, then these can be attached. The statement provided may be used as part of any disciplinary hearing, appeal process or Employment Tribunal.

In the event of a formal Disciplinary process you may be required to attend any disciplinary hearing as a witness (if required).

Questions

Q 1	MWV	Can you confirm that you were afforded the right to representation and that you are happy to go ahead unaccompanied?
	KL	Yes
Q 2	MWV	Can you confirm your working relationship with Ian Barkley? Have you ever managed Ian? (If so, when was this - dates)?
	KL	Started January 2015 based at Southlink with Ian, I was Head of service, I have known Ian since I started. Ian has always been in my service, but I have not directly line managed Ian.
Q 3	MWV	During your working relationship with Ian have you ever witnessed or had to address any cause for concern with Ian's behaviour?
	KL	<p>I first started regularly reminding Ian about Council values and behaviours, with his interactions on the phone with people ringing the department with queries about charges and with colleagues, nothing formal but in March 2017 Ian was at a Staff conference using offensive language and being disruptive and he was issued with a Letter of Concern.</p> <p>I have a chronology of concerns over a number of years that highlights a pattern of the unacceptable behaviour that Ian demonstrates, Ian's inability to follow management requests or instructions that have resulted in formal management instructions being issued and a disciplinary investigation in 2020 with recommendations being advised to management and Ian. There is also financial detriment to the Council due to Ian's actions not following procedures or instructions.</p> <p>Kirsty ran through each point within the chronology (attached) and provided an electronic copy of all the appendices to accompany the chronology.</p> <p>More recently further instances have been:</p> <p>3 November 2022 – Ian is blocking Sophie in being non-responsive to her instructions, Ian's DBS registration is not completed having advising management this was done in June 2022, mandatory training not been done having been reminded to do so. Sophie is battling against a brick wall, it is taking a lot of time and effort for Sophie to manage Ian, he is becoming untenable, and it is feeling like Sophie is being bullied.</p> <p>4 November 2022 – I was requested to join a TEAMS call with Lisa Entwistle and found Sophie on the call, in tears, having requested emergency leave following Ian's behaviour towards her the previous day. I feel she is going to have a breakdown and put in a grievance as Ian's behaviour despite the Letter of Concern being issued is escalating and impacting on the mental health and wellbeing of others inclusive of Sophie as his line manager.</p> <p>Recently I feel Ian is treating Kelsey and Sophie disrespectfully constantly.</p> <p>He is disruptive not complying with Council values.</p>





		<p>I feel I am going to lose a very good member of staff (Sophie) because of Ian's behaviour.</p> <p>Ian has made comments to Sophie about the service redesign, he does not like it, a full consultation process was conducted, and Sophie was also subject to her role under the redesign and it is not Sophie's responsibility that Ian is not happy with the re-design outcome</p> <p>Ian's behaviour is erratic.</p>
Q 4	MWV	Following meetings and any management instructions issued does Ian's behaviour improve?
	KL	It does temporarily then goes back to how he behaved previously.
Q 5	MWV	How does Ian interact across the service, have you had any reports from other managers?
	KL	Liz Taylor in finance – linked to CHC recharges not being delivered. Liz has raised repeated concerns about Ian and not completing work requests.
Q 6	MWV	From the incident 3 November 2022 and Sophie going off work. You were brought into a TEAMS call about Ian's behaviour against Sophie? How has it made you feel in relation to the health of a colleague.
	KL	<p>Lisa asked me to join a TEAMS meeting, Sophie was sobbing in tears.</p> <p>We need to support our management team and colleagues, seeing Sophie like this brought a tear to my eye. Sophie can be strong and the fact she was in tears is massively unacceptable, her mental health is affected Sophie had said she did not know how she was going to get through the day.</p> <p>It was clear that Sophie could not work today 4 November 2022. Sophie is extremely hard working, an asset to service, works tirelessly for the organisation. Sophie is having time out to reflect on her mental wellbeing.</p> <p>I felt this was a cry for help. For me and Lisa we have to decide how to maintain a healthy relationship to protect both Sophie and Ian.</p> <p>If you had seen Sophie's face she was broken. I feel Ian targets women in the teams and it amounts to bullying.</p>
Q 7	MWV	Is there anything else you wish to add to any of the questions presented today?
	KL	Some things not in the Chronology are requesting Ian to meet deadlines, requesting information that is required it is like Ian's does what he wants, when he wants, at his pace and in his own time.



I confirm that this is a true and accurate account of our discussion.




Date: 11 November 2022





Signed:




IB Chronology

Date	Incident
28/03/2017	<p>LOC issued after use of offensive language (swearing), inappropriate comments about the staff conference and negative behaviour as he was not engaging and being disruptive.</p> <p></p> <p>170412 IB - LOC1.msg</p>
16/01/2018	<p>IB completely ignores my instruction to share the debtor cases prior to a meeting with legal services. I asked his manager (Andrew Evans) to pick up a discussion. This was despite repeated requests for the information to be shared.</p> <p></p> <p>180201 FW Case conference.msg</p>
01/08/2018	<p>IB does not action a safeguarding concern relating to financial abuse of the client as per a management instruction which asked it to be progressed as a safeguarding concerns, to meet with daughter and arrange a payment plan for the deprived assets.</p> <p></p> <p>190409 FW RE 201648 HW Debt.msg</p> <p>Council subsequently lost income of £27k plus costs for commissioning independent legal advice and the resident had all of his assets deprived by his son.</p>
07/02/2019	<p>Escalation from Lisa Entwistle about Ian's approach. Lisa raised concerns about Ian being openly critical and negative on staff which was leading to a negative impact on their wellbeing. Noted this isn't an isolated incident and has been raised repeatedly with no improvement.</p> <p></p> <p>190208 RE Ian.msg</p>
10/04/2019	<p>Informed by social worker that Ian refused to attend a financial abuse safeguarding meeting as 'there was nothing more we could do'. Manager at the time (Andy Pearson) issued a LOC.</p>

Date	Incident
	<p>This was one of many incidents which Andy was progressing with HR at the time.</p> <p></p> <p>190410 RE HW (201648).msg</p> <p>Advice was to proceed to an investigation.</p>
10/04/2019	<p>Ian submits a grievance against Andy and myself. Helen Ramsden is allocated as the investigating officer. After initial discussions with Ian, the grievance is felt to only relate to Andy.</p> <p>As the grievance is lodged concurrently with Andy exploring the concerns relating to Ian's performance, it is agreed to progress both informally. The following actions are agreed:</p> <ul style="list-style-type: none"> • That issues that have been raised regarding Ian will be dealt with through a performance management approach • That once Ian returns to the team, you will arrange a PPF and PDP meeting, and make the links to the council's values and behaviours, with Karen in attendance • That excel training for Ian be progressed • Ian confirmed that he will consider his responses and reactions when dealing with others, and if he feels the need to make comments about the performance of others, he will do this away from an open office • That you will develop a team plan, linked to the ASC business plan and objectives in your team's PPF's, that gives people the responsibility and opportunity to deliver on • That you will establish a senior team meeting to discuss team objectives and priorities, linked to the team plan • That with Karen's support, a team development session is set up with OD to understand each other's personalities and working styles, and how to work effectively as a team and get the best out of each other • That Karen liaises with OD to look into management development training for you • That Karen will undertake a stress risk assessment prior to Ian's return to the team, and agree a date for this return • That if you feel you need support in managing Ian or the wider team, you seek this from Karen • That the four of us, and Ian meet later this week to collectively go through these outcomes • That I am happy to meet again in three months' time, to see how things are progressing. <p></p> <p>190618 RE IB Informal grievance.msg</p>

Date	Incident
19/06/2019	<p>Email to Karen Maders (Ian's manager) to query why Ian is not sending issues relating to my service to myself rather than all other Heads of Service. Karen addresses in a discussion with Ian.</p> <p></p> <p>190619 IB Cases.msg</p>
04/09/2019	<p>IB continues to exclude me from key service emails including ones that pose a significant financial and reputational risk to the authority. I meet with Ian at the Link Centre to explain expectations, roles and responsibilities so it is clear.</p> <p></p> <p>190904 FW Catch Up.msg</p>
04/11/2020	<p>IB ignores KL's request for a legal referral to be completed for a case and does not complete.</p> <p></p> <p>191104 RE IB ref 94345 1.msg</p>
01/02/2020	<p>Investigation commences as IB is accused of a number of issues including:</p> <ul style="list-style-type: none"> • Unacceptable behaviour towards a female social worker • Referring in derogatory terms about the AD i.e. Queen • Being dismissive, arrogant and rude to his managers • Being overbearing and controlling of staff • Broadcasting peoples errors to other teams and singling people out • Not completing his PPF despite a management instruction to do so and being provided with time to complete • Not following due process and doing his own thing for CHC recharges • Purposely excluding the AD from key service emails • Not turning up to meetings with his manager <p>Investigation found there to be insufficient evidence to proceed and IB was informed of this. Some recommendations relating to management support and oversight, training and development.</p>

Date	Incident
	 200309 Investigation - IB.ms Investigation concluded March 2020.
26/10/2021	<p>Ian did not attend a meeting with his manager and a colleague from another service area. When his manager did eventually get him to attend the meeting his behaviour was rude, inappropriate and unacceptable. Ian's manager formally wrote to him to inform him of this.</p>  RE_ Meeting this morning.msg
05/11/2021	<p>Client's family contact Client Finance and are supported by Shelley, the Business Support Officer. The family member informs them that Ian has said:</p> <p><i>"I do not know what I am talking about as I don't really work for the team, I am just in business support"</i></p> <p>Shelley was extremely upset.</p>  Comment made by IAP staff member.ms IB's manager speaks to him and he admits saying the above. IB is reminded of council values and behaviours.
17/11/2021	<p>Wendy Whitehead from Client Finance informs her manager that Ian was rude to her during a Teams meeting and closed his laptop whilst she was speaking. There was only the two of them on the call.</p>  RE_ Comment made by team member.msg
10/12/2021	<p>Lisa meets with Ian who says he does not agree with the outcome of the business service redesign and if he wishes to raise a grievance against Kirsty who would this be to. Lisa confirms it would be Mark Warren and informs myself and Mark via email. an subsequently ignores Lisa's Teams call</p>

Date	Incident
	 RE_ Ian Barkley - Income and Payments Team .msg
08/03/2022	<p>Lisa meets with IB as he continues to ignore management instruction and have negative interactions with staff which impact on their mental wellbeing.</p> <p>Lisa informed IB she was issuing him with a warning and advised that a letter of concern will follow if this unacceptable behaviour around conduct with managers and the team continues.</p>  lan.msg
27/05/2022	<p>IB met with his manager (Sophie Harland) who raised concerns about his approach when speaking to colleagues and managers including being disrespectful and dismissive of others.</p> <p>LOC formally issued to IB in writing on 9 June 2022.</p>
17/06/2022	<p>IB placed on a 4-week monitoring period as his behaviour to colleagues did not improve.</p>
29/07/2022	<p>Despite monitoring and performance arrangements adopted by the manager and initial improvements in IB's behaviour, this was not sustained so was referred to HR with an evidence file of issues.</p>  Confidential_ Timeline for disciplinary investigation IB.msg
01/08/2022	<p>Investigating Officer and HR Advisor appointed to investigate concerns relating to:</p> <ul style="list-style-type: none"> • Conduct and behaviour • Not following management instructions • Timekeeping
08/08/2022	<p>IB informed of a meeting to discuss allegations and a formal investigation. Investigation is centred around recurrent themes of not following management instructions, having a negative impact on the wellbeing of other staff/colleagues, non-delivery of work and non-attendance at meetings.</p>

Date	Incident
28/09/2022	IB repeatedly asked to provide an update on 12 outstanding queries for CHC recharging, despite repeated requests to provide updates by his manager. Not actioned until late October 2022.
16/10/2022	SH informed me that a case had not been actioned but was closed on the tracker. IB admitted closing it without actioning following allocation to him on 26 September, after initially denying it was on the tracker. This caused undue distress to the family as the client had passed away and they were having to contact the department multiple times to get it actioned.
31/10/2022	<p>IB continues to not action tasks as instructed by his manager including:</p> <ul style="list-style-type: none"> • DBS update not completed • Not updating his outlook calendar • Timesheet not reflective of his breaks • Non-completion of mandatory training – Cyber Security • Intranet not updated with correct details <p>IB has again not responded by the deadline.</p>
31/10/2022	IB continues to ignore management instructions and pick up work that is not within the remit of his role, at the expense of completing work that is outstanding. This includes provision of incorrect advice, wrong calculations and escalation to the incorrect managers.

Confidential

Statement

Name: Angela Barnes

Occupation: Carers and Brokerage Manager

Work Place/Location: Oldham Council

Date of Interview: 9 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

I have been appointed as the investigating officer in relation to an allegation(s) regarding concerns over the unacceptable attitudes towards other staff on the team and within management by Ian Barkley.

The purpose of today is to obtain further information in relation to the allegation(s) which may potentially lead to a hearing under the Disciplinary Procedure.

I have some questions that I would like you to respond to as a witness to part of the allegations raised against Ian. You will have the opportunity after the questions to add anything further in relation to the matter under investigation.

Following this process, a statement will be typed up and sent out to you to sign as a correct record of the discussions held. If you feel that you wish to make any amendments, then these can be attached. The statement provided may be used as part of any disciplinary hearing, appeal process or Employment Tribunal.

In the event of a formal Disciplinary process you may be required to attend any disciplinary hearing as a witness (if required).

Questions

Q 1	MWV	Can you confirm that you were afforded the right to representation and that you are happy to go ahead unaccompanied?
	AB	Yes
Q 2	MWV	Can you confirm your working relationship with Ian Barkley?
	AB	<p>I was Ian's line manager previously around May 2021 until January 2022.</p> <p>There is overlap where I work with Ian, some clients have direct contact with Ian and Ian has picked up queries that now come to us. Ian should not be dealing with our queries.</p>
Q 3	MWV	Can you advise if you have ever witnessed any concerns in Ian's behaviour towards other managers or staff members within the service?
	AB	<p>Ian can be quite bombastic; Ian can be loud. When we were in a small room, he was very loud, dominated the room and could be very outspoken about his views and opinions.</p> <p>I have heard Ian be disrespectful when we worked at the Link Centre – July 2021. Ian came into an office where Sophie and Kirsty were and was disagreeing with what and how things should be done. This incident was with Sophie and Lisa, not Kirsty. Ian can be outspoken. Ian can be intimidating, patronising and disrespectful to people. Andy Pearson has had issues with Ian in the past.</p> <p>Ian can be extremely good at his job but Ian thinks he does things his way then the next day he can be the total opposite.</p> <p>I have had to raise about Ian swearing in the office, he has apologised but then soon after the swearing has occurred again. It is so frustrating from one day to the next.</p> <p>Some work has been incomplete because Ian tries to do everything and does not always follow process.</p>
Q 4	MWV	How does Ian's behaviour impact on the team and make them feel?
	AB	<p>Team do not know where they are up to any one day, he can be excellent in training one day then next day he will challenge staff in the middle of the office.</p> <p>There was a recent piece of work, a request to purchase a residential placement this came to the brokerage team and part of this was a mental health purchase and Ian removed it even though it had been authorised to be paid. It has been raised before and we should not be questioning what is being purchased. Ian removed the instruction and told the colleague that they had done something wrong. An email was sent to Brokerage team and I asked Ian not to amend work in future and any queries should be passed to the Brokerage team.</p>

Q 5	MWV	Where there notes on MOSAIC to reflect what actions had been taken by Ian?
	AB	No notes were input
Q 6	MWV	How long have you worked with Ian in Adult social care?
	AB	<p>Worked a number of years, I feel Ian is a power person and he knows better, and thinks his way works and he does not need to follow processes.</p> <p>Example: When I took over the team Ian would tell me that he did more work than anyone else, others being paid higher did little work and for a long time Ian used to comment about this. I felt Ian's comments were a control thing.</p>
Q 7	MWV	Is there anything else you wish to add to any of the questions presented today?
	AB	<p>Ian's manner and his loudness can be intimidating.</p> <p>I was outside a room and Ian and Sophie were in the room as I was waiting to go in, to use the room (3 November 2022 - pm). I could hear Ian being very loud in the room he sounded aggressive. I thought poor Sophie in a room on her own I would feel intimidated if that was me.</p> <p>We have had team meetings and when Ian has come out of meetings he can make comments like 'that was a waste of time'.</p>

I confirm that this is a true and accurate account of our discussion.

Date: _____

Signed: _____

Confidential

Statement

Name: Lisa Entwistle

Occupation: Head of Prevention and Client Services

Workplace/Location: Oldham Council

Date of Interview: 14 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Thank you for attending today.

I have been appointed as the investigating officer in relation to an allegation(s) regarding concerns over the unacceptable attitudes towards other staff on the team and within management by Ian Barkley.

The purpose of today is to obtain further information in relation to the allegation(s) which may potentially lead to a hearing under the Disciplinary Procedure.

I have some questions that I would like you to respond to as a witness to part of the allegations raised against Ian. You will have the opportunity after the questions to add anything further in relation to the matter under investigation.

Following this process, a statement will be typed up and sent out to you to sign as a correct record of the discussions held. If you feel that you wish to make any amendments, then these can be attached. The statement provided may be used as part of any disciplinary hearing, appeal process or Employment Tribunal.

In the event of a formal Disciplinary process you may be required to attend any disciplinary hearing as a witness (if required).

Questions

Q 1	MWV	Can you confirm that you were afforded the right to representation and that you are happy to go ahead unaccompanied?
	LE	Yes
Q 2	MWV	Can you confirm your working relationship with Ian Barkley? Have you ever managed Ian? (If so, when was this - dates)?
	LE	<p>Currently - Ian came under my service portfolio January 2022.</p> <p>Previously - I have not been his direct line manager but Ian has always been under my portfolio area and I have worked alongside Ian.</p>
Q 3	MWV	During your management/working relationship with Ian have you ever witnessed or had to address any cause for concern with Ian's behaviour?
	LE	<p>Yes, main one was when I returned from maternity leave (October 2021) I was on phased return. In Sept 2021 I did some keeping in touch days and shadowed working with Ian. During the time I was in work Ian told me how rubbish the service is and how the structure is not right.</p> <p>November 2021 returned fully as client finance manager Sophie was acting up whilst I was on maternity leave. In November 2021 there were complaints from Wendy and Shelley about Ian's behaviour – Wendy raised the way Ian held conversations and was rude. Shelley was Business Support and Ian made a comment in the office that she would not know anything as she was only 'Business Support' this was heard in the open office. This was raised with Angela Barnes and Angela had a conversation with Ian, Ian acknowledged that he had been inappropriate about Shelley.</p> <p>I was not managing Ian, but I was having a conversation with Ian when I was shadowing with him 10 December 2021. I met with him and we went in another room and Ian was talking about the restructure he said he was not being consulted with and why was he being moved to another post when he had all the knowledge of brokerage. I asked Ian if he had a 1-2-1 about the restructure and Ian confirmed he had a 1-2-1 with Kirsty, his Union was present and asked questions at 1-2-1 but later Ian said he was not given clarify to his questions.</p> <p>Ian asked if he wished to put a grievance in about the restructure who would he put that into. He was advised that it would be Mark Warren but nothing came from that.</p> <p>4 January 2022 restructure in place and Ian was in my area of responsibility.</p> <p>Jan – March 2022 – there were a few discussions in the office where Ian was disrespectful and one day he said to me let me break it down for you to simplify so you understand. I reminded Ian who he was speaking to and that his statement to me was not appropriate. I was in another meeting and Ian was rude to Katie about third party payments and I had to remind Ian again about his behaviour.</p>

		<p>8 March 2022 issued a warning by email to Ian about lack of respect to management not following instructions, I did advise if his behaviour continued, he would be receiving a letter of concern</p> <p>I spoke to Ian about the concerns, and we also discussed time management and Ian response was that with his military background he knows all about time management.</p>
Q 4	MWV	During your management/working relationship with Ian have you ever had any concerns in terms of Ian complying with management instructions/requests in relation to work responsibilities?
	LE	In June 2022 Ian's behaviour was still of concern and his non-compliance with instructions had continued and he was issued with a letter of concern and placed on a 4-week monitoring period. Sophie had taken over line manager in April 2022 there were ups and downs with Ian, Ian disregarded things as not important when being asked to undertake work and I advised Sophie to issue a letter of concern following my warning in March as things had not improved.
Q 5	MWV	What OTHER support was put in place to address/support any concerns raised?
	LE	I spoke to Sophie in her 1-2-1 with me and weekly catch ups we discussed and reviewed regarding Ian's behaviour and if there were further concerns occurring. Time management support was offered to Ian but he felt he did not need it.
Q 6	MWV	Can you advise if you have ever witnessed Ian's behaviour towards other managers or staff members within the service?
	LE	<p>I have seen Ian speak disrespectful to colleagues, we were in a team session with the Brokerage team, Kirsty attended as a listening event, team had not been functioning well, so it was an opportunity to look at ways of working. Ian said in the meeting monkey see, monkey do, to working ways. I felt like he was saying team are not good at their work.</p> <p>I have witnessed Ian speaking disrespectfully, to colleagues, rolling his eyes.</p> <p>On one occasion Aneeq had asked me if Ian was the best person to attend a meeting. During the meeting Ian was rude to Katie and Aneeq said that is why he had asked if Ian was the best person to be at meeting.</p> <p>Ian has spoken to Angela Barnes disrespectfully and I felt Ian took advantage of Angela as she did not have the knowledge at the beginning, Ian used to give minimal information rather than the full picture.</p> <p>I have seen Ian have a lack of respect towards Sophie. Ian is disruptive as a person</p>
Q 7	MWV	Do you think Ian was not happy with the move under the restructure?
	LE	Ian was not happy Ian's behaviour is that if things don't go his way, his priority, he will be disruptive or not complete work. I don't think the restructure helped

		Ian was against it. Ian has said he feels miserable coming into work but since he has now been temporarily moved to Business Strategy he feels ok.
Q 8	MWV	Can you advise any examples of when Ian has not followed management instructions or completed work requests?
	LE	<p>When queries come into brokerage team it was always Ian that had dealt with the work, on occasions Ian has amended things in the Brokerage team which is not his role anymore and Ian does not have the authority to be amending things on the system. He also ignores putting any notes on Mosaic.</p> <p>CCG work has been a nightmare Ian has not followed up on recharges which can be millions of pounds of finance impact.</p> <p>Some enquiries that Ian had said he has dealt with the query have later come back as incomplete. There was a query involving a deceased person that Ian had dealt with, Ian said I was waiting as person had died but there were no case notes or trail about the query.</p>
Q 9	MWV	Can you tell me about the situation that happened a couple of weeks ago regarding Ian and Sophie?
	LE	<p>3 November 2022 Sophie had had a conversation with Ian about work and not following instructions. Following the meeting with Ian Sophie asked for a catch up on TEAMS for 7.30am following day, I re-arranged work to meet with Sophie and I witnessed Sophie in tears, Ian had been confrontational, rude, Sophie said she felt Ian was playing mind games, making her question everything being asked of him and felt Ian was bullying her. I called Kirsty into the TEAMS call to witness the state Sophie was in and I have never seen Sophie like this she was shaking and sobbing I advised her to log off for the day, I had to get Sophie's meetings covered due to her state and Sophie submitted a grievance against Ian.</p> <p>I met with Ian on the Monday spoke to him that a grievance had been submitted and it was clear that his and Sophie's relationship had broken down and that I would move him to Business Strategy whilst the current investigation was on going. I had sought HR advice about moving Ian.</p> <p>I asked Ian about the break down in the relationship with Sophie, Ian did not believe the relationship had broken down and continued to comment about the restructure and was not answering the question. Ian did not seem to be affected by the grievance Ian said if the outcome of the current investigation was not what he wanted then Ian stopped talking, I asked what he meant, he said being sacked. Then stopped talking again.</p> <p>I advised Ian he would be working in Business Strategy from the next morning I spoke to Ben Simmons to make him aware that Ian had to do a full handover.</p> <p>I have spoken to Ian whilst he has been in Business Strategy and he says he feels happier. I have had to have a talk with Ian about going onto the area where client finance is sitting near Sophie. Ian said I had not made it clear he could not go into that area.</p>
Q 10	MWV	How does Sophie feel about the new working arrangements put in place?

	LE	<p>Sophie feels on edge of bumping into Ian but feels better Ian is not in main office area.</p> <p>Sophie has recently had a 1-2-1 with Kelsey and Kelsey raised that Ian had been constantly emailing her saying things needed doing. Kelsey broke down in the 1-2-1 as she had asked colleagues if Ian was sending the team emails as she was receiving a lot and no one else had been contacted to deal with queries. Kelsey stated she feels she is being bullied. Ian knows the process to send queries to the team not any one individual that is resulting in Kelsey becoming overwhelmed with work due to Ian not following process.</p>
Q 11	MWV	How do you think Ian's behaviour makes the team feel?
	LE	I would be concerned about the wellbeing of the team whilst Ian is around. Sophie has stated she would leave the council if things do not change. I feel Ian being in this team is not helping anyone, the disruption is too much.
Q 12	MWV	Is there anything else you wish to add to any of the questions presented today?
	LE	<p>I know in the past comments have been made that it is Ian's personality, the way he interacts but it is not acceptable to behave in the way Ian does with customers, colleagues, management there is no respect for others.</p> <p>Ian has said that the relationship with Sophie changed after staff engagement earlier this year where Ian spoke in a public arena about management, Sophie did speak to Ian about the comments in a 1-2-1 and Ian felt that was when the relationship changed.</p>
Q 13	MWV	How does Ian's behaviour make you feel?
		<p>It is not good; I feel frustrated I feel Ian does not want to be here anymore and other members of staff feeling intimidated by Ian specifically Sophie and Kelsey it is not fair and cannot continue or staff will be leaving.</p> <p>No staff member should come into work and feel intimidated or bullied I fear staff will leave the Council.</p>

I confirm that this is a true and accurate account of our discussion.

Date: 15th November 2022

Signed: _____

L. Entwistle

Confidential

Statement

Name: Sophie Harland

Occupation: Client Finance Team Manager

Work Place/Location: Oldham Council

Date of Interview: 18 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Today's meeting was explained that it was to interview Sophie as she had submitted a grievance against Ian Barkley dated 6 November 2022.

Questions

Q 1	MWV	Can I confirm that you are happy to continue with this interview unaccompanied
	SH	Yes
Q 2	MWV	I have been advised that you have submitted a grievance dated 6 November 2022. Are you happy for the grievance to be considered and investigated within the disciplinary investigation already in process
	SH	Yes
Q 3	MWV	Why have you now felt the need to put a grievance in against Ian Barkley
	SH	I have tried to manage Ian as best I can and deal with things without the requirement of HR support, but I cannot physically carry on with working with Ian. He does not listen to me or follow any instructions.
Q 4	MWV	On the 3 November you had a meeting with Ian can you advise what happened at the meeting?
	SH	I had been asking Ian for updates on numerous things that were outstanding his DBS update registration, inaccurate breaks on timesheet, not updating

outlook calendar and chasing his Stress Risk Assessment checklist that he had not returned as a recommendation to support him from an Occupational Health report. I had asked in supervision for all of these but Ian did not provide any updates, I chased with a deadline, chased again. Ian's email response was short and had a tone which prompted me to arrange a face to face with Ian from his email engagement and comments.

The notes from the meeting held are:

Sophie advised that she wanted to meet with Ian as she is concerned about him and his engagement this week.

Ian advised he was asked if Sophie always speaks to Ian like that – Sophie asked if this was in a meeting yesterday? Ian answered with 'this was a general observation.'

Sophie asked Ian why he is not responding to emails by deadlines given. Ian advised he wonders how much Sophie thinks he can do and that he has been in contact with Diane Outram regarding his training. Sophie asked why Ian would have expected Sophie to follow this up and he has put it in his response. Ian advised that he thought Sophie would have looked into this when he showed me his screen. Ian also advised that he does not know what powers Sophie thinks he has to ask for something to be completed and that the directors have advised staff need to be given the tools to complete their job.

DBS check – The policy is Oldham Council will use the DBS Update Service to undertake quarterly re-checks for all employees who work in social care, therefore staff have to be signed up to the update service. Ian advised he followed a link and he has wasted time. He has a DBS which apparently allows him to do the job. Ian advised he is not bothered about paying £13, £20 or £60. Sophie asked why Ian did not say this during his supervision session when we discussed this. Ian believed he did say this. Sophie asked if he reads his supervision notes and Ian advised he does not. Ian would not repeat what he said and said 'I have said it once Sophie.'

Inaccurate breaks being recorded on timesheet – Ian advised that Sophie's email was interpreted by him that it was Ian smoking a cigarette for half an hour. Sophie advised not and it was the length of time that Ian was away from his desk. Ian asked why this is only coming to light now as it was from July and Sophie advised that this is because Ian has only just sent through the timesheets for that period. Ian advised he had sent this through prior. Sophie advised this is not the case and the three timesheets that Ian has recently sent started from the period 25 July. Ian asked Sophie to be more specific and Sophie advised that she observed that he went on a break from 3.30-4pm that day. Ian said he is pretty certain that other people are away from their desks and it is not picked up. Sophie asked how Ian knows what is on everyone's timesheets. Ian advised that a lot has happened since then, he has broken his leg and been off work.

Calendar updates – Sophie asked what the difference is between not updating his calendar now and then updating when completing Financial Assessments? Ian believes that it he should only update once completing the Financial Assessments', the same as the other officers. Sophie advised that the expectation is for everyone including Ian to record on the calendar what

he is working on that day and it should be updated as work is completed and when proprieties change during the day. Ian advised that if he puts something in his calendar say for a morning of CCG queries and he finishes early, he would be then completing something that it not in his calendar. Sophie advised that Ian would then amend his calendar with the changes in times / what he is completing, it is not set in stone the period of time he might require to complete one task. Ian believed he would not be accurately representing the work he was completing, and Sophie advised that calendars can be updated on a daily basis as things change and that we had discussed this in the last supervision session. Sophie gave an example of if she has a meeting arranged for 4pm that is cancelled, she will complete another task and add the change to her calendar. Ian advised that he has not had to complete this before and not when we were both Finance Officers and he has not seen the policy for this. Sophie advised that there is not a policy for this, this is a requirement of the team to plan their time and record their activities.

Stress Risk Checklist – Sophie has asked Ian if he has now decided not to complete this assessment? Ian advised that if he decides to complete the SRC today it may be because he feels stressed. Ian also advised that he does not feel that a Stress Risk Assessment will change things.

Sophie asked Ian what he means by 'emails like this do not help the situation?' Ian advised that this is 'To be answered at a later date if required.'

Sophie advised Ian that he finds it really disrespectful that Ian does not respond to Sophie's emails / requests. Sophie has to chase Ian multiple times for things, which Ian does not seem to appreciate. Sophie asked Ian how we move forward from here?

Sophie advised that she will speak to HR about Ian not having a DBS update service registration. Ian advised he would like to contact HR himself, as he advises they should have received an email as DBS advised they will contact his employer. Sophie to provide email address.

Sophie asked how we move forward with Ian not responding to emails? Example given of the email asking for updates and the CCG queries Ian was responsible for providing updates. Ian asked if Ben was also accused of not actioning work. Sophie advised she has spoken with Ben regarding this however the email stated that Sophie acknowledged that Ian was dealing with these enquiries, as identified in the team planning session and updated on Ian's responsibilities. Ian referenced that he has spent some time this week on CCG queries following the debtors report and email from Liz Taylor. Ian sent a spreadsheet over to Sharon Bennet (CCG colleague) to which she has responded to advising that she had discussed with Ben, which has not been relayed. Ian advised that he knows when he has put comments on the spreadsheet in the past nothing is being updated from CCG. Sophie advised that there is no formal meeting in place with CCG which should be in place on a weekly basis. Ian believes that weekly meetings will only be required if there is an agenda. Ian advises that on the new ledger we do not appear to have any queries. Ian advises that he does not think it would be fair for the team to sort out if this is not kept on top of. Ian believes there is support required from Brokerage. Ian believes that not all staff know what they are doing, as there are some people in Brokerage who will not end a contribution / will end some parts of things if services have stopped. Some Brokerage team are unclear on when to purchase a provision that is joint funded if they

		<p>should wait for the joint funding letter to arrive. Ian believes that some of the Brokerage Team still do not notify Client Finance when a joint funded purchase is completed.</p> <p>CCG Billing requirements – Emails have been back and forth today. Ian asked whose responsibility it is for setting up debtors. Sophie advised this is Client Finance and as part of the FA process we have implemented that we are to set up the debtor number. This is the same for CCG debtors. Ian believes that not all the team have been actioning this as there are not often debtor numbers updated on MOSAIC. Sophie will pick this up with the team and ensure references are added onto MOSAIC once set up.</p> <p>Ian is still unclear on creditor / debtor number requirements for 3 OOB recharges. Sophie asked why these 3 queries are any different to other OOB placements we are recharging for? Ian advised he has never had to set up any debtor numbers for any of these individuals and has just asked for each home to be linked to the required recharge element. Ian advised that we require a meeting with him, Jill Phipps (Brokerage Team) and Razzaq Mohammed (Digital Technology - Mosaic). Ian advises he was sat like he was in yesterday's meeting as nobody was understanding what was being said in yesterday's meeting and it winds him up. Sophie advised that she does not know what Razzaq is completing now, and Ian has asked if managers can arrange a meeting as he believes the relationship with Brokerage has become frosty. Sophie asked Ian if he is happy to meet with Razzaq and Jill this afternoon if she can arrange this? Ian advised yes. Sophie has messaged Razzaq, and he is available. Sophie will ask Jill when we leave this session now.</p> <p>Sophie will arrange a catch-up next week re CCG – Billing issues and recharge changes required in MOSAIC.</p> <p>Throughout the meeting Ian showed me a condescending attitude, was rude and ignorant. Ian raised his voice towards me and was very loud.</p>
Q 5	MWV	How did it make you feel when Ian was talking to you in a loud manner?
	SH	I thought why is Ian being like this, I felt he wanted an argument and I felt he was being intimidating.
Q 6	MWV	What was the final straw for you in considering a grievance?
	SH	The meeting of the 3 November, trying to deal with things informally, made me feel like I had no other option as Ian was being obstructive not allowing us to move forward and deflecting to answering questions. There was a continued lack of respect.
Q 7	MWV	The following day Friday 4 November you felt you could not present for work can you explain this to me?
	SH	<p>I felt I could not face work, that is not me. I did not absorb what had happened in the meeting with Ian, then the next morning I thought I cannot work I was getting ready to come to work but I just could not face it. I contacted Lisa to say I need a catch-up, I cannot work with Ian anymore like this.</p> <p>I felt I could not show my team how Ian had made me feel, the utter contempt Ian shows me I spent the whole day crying. Nothing has ever been done</p>

		<p>before Ian does not have the values of the council. Dealing with this has been really exhausting</p> <p>Now Ian has been moved he was initially still coming over to the team and making his presence known. I contacted Lisa to question why Ian is coming over to the team.</p> <p>Colleagues have commented that since Ian is not around it is a better atmosphere and staff have commented they feel they can breathe.</p> <p>Ian was still coming over to Kelsey and had been emailing queries to Kelsey, which he should have dealt with.</p> <p>I have asked Karen who is now managing Ian what work has she allocated to him, so I can be clear with my team, as he is still involving himself in our work.</p> <p>Kelsey broke down in a supervision as she feels that Ian is singling her out.</p> <p>Part of my grievance is that Ian is undermining me all the time, trying to knock my confidence.</p> <p>I feel Ian is playing games trying to be disruptive.</p>
Q 8	MWV	In your grievance you have stated Ian is affecting your mental health and wellbeing can you explain this?
	SH	Ian is making my time not enjoyable, causing me unnecessary stress and obstructing the team from being the best we can be. I am having to manage other staff more proactively as Ian is scaremongering staff.
Q 9	MWV	Ian was off sick 9 August 2022 to 18 September 2022 what was the reason for absence?
	SH	<p>Ian's fit note stated work related stress. To support Ian it was agreed for an Occupational health referral and a recommendation was for a stress risk assessment (SRA) to be put in place.</p> <p>Ian has since not returned the SRA checklist and has commented this is no longer felt needed.</p> <p>Everything I say or try to do with Ian is a constant battle.</p>
Q 10	MWV	How do you feel the relationship between Ian and you would be in the future?
	SH	<p>I would not be able to work with Ian at any point in the future, I would not be able to cope and I would seriously consider leaving my role as I should not have to come to work and be treated like this.</p> <p>Ian's issues with me are serious and even now if I bumped into Ian in the office I feel anxious.</p> <p>Ian's behaviour and values towards myself and the council are not acceptable and inappropriate.</p>

Q 11	MWV	Do you think Ian's behaviour is towards you as his manager or towards you as an individual?
	SH	I think it is both, Ian is disrespectful towards me as a manager the multiple examples of not responding to my management requests and his treatment of me as an individual is not acceptable.
Q 12	MWV	Is there anything else you feel you wish to add to the questions presented today?
	SH	No, I feel I have covered my thoughts and feelings that Ian displays towards me as wholly inappropriate.

I confirm that this is a true and accurate account of our discussion.

Date: 01 December 2022

Signed: Sophie Harland

Confidential

Statement

Name: Kelsey Barnes

Occupation: Client Finance Officer

Work Place/Location: Oldham Council

Date of Interview: 24 November 2022

Present: Margaret Warburton-Vaughan - Investigating Officer
Julie Kippax - HR Advisor to Investigating officer

Introduction:

Today's meeting was explained that it was to interview Kelsey as she had submitted a grievance against Ian Barkley dated 17 November 2022.

Questions

Q 1	MWV	Can I confirm that you are happy to continue with this interview unaccompanied
	KB	Yes
Q 2	MWV	I have been advised that you have submitted a grievance dated 17 November 2022. Are you happy for the grievance to be considered and investigated within the disciplinary investigation already in process
	KB	Yes
Q 3	MWV	Can you explain your working relationship with Ian Barkley?
	KB	Both Ian and I are in the same post as Client finance officers I have been in post since 2019. Ian came over to the Client finance team in January 2022. Ian is not happy in the post and he has made it clear he is not happy. We can work well on occasions but most of the time I don't want to ask Ian for help.

Q 4	MWV	Why have you now felt the need to put a grievance in against Ian Barkley
	KB	<p>When we did the disciplinary interview, I was annoyed with things and after a couple of weeks Ian was sending work through to me, only to me and not to anyone else in the team which is the way work should be passed.</p> <p>Ian knows I am under pressure, and I feel it was adding to my workload and I feel he knew it would put me under pressure, I felt he was pushing me to see how much I can take and I felt I was being tested.</p> <p>I feel Ian is being manipulative towards me and I have noticed recently that my mood has changed due to Ian's approach towards me.</p>
Q 5	MWV	When you say annoyed what do you mean?
	KB	At the disciplinary interview I felt there were many small things discussed but on reflection I feel Ian is singling me out and only directing work to me.
Q 6	MWV	Have there been instances in the past prior to your decision to submit this grievance that you have experienced Ian's behaviour towards you?
	KB	<p>There have been issues previously and I just thought it was Ian and took his comments like everyone else did and does. When I looked for guidance from Ian, he has made it difficult for me and I feel he may have given me misguided or wrong information to make me look like I was doing things wrong, this relates to work on charging client assessments. Ian was giving me instructions that I felt were scaremongering as he was saying we will miss deadlines, but we would not have, we had plenty of time to do the work.</p> <p>There was an occasion when Sophie was not in and I needed some advice, so I rang Ian, I took his advice and replied to the client, and it turned out the information was wrong that Ian had given me and this made me look stupid to the client. I think back and feel Ian was misguiding me on purpose. Thinking back, I think this was towards the end of 2020.</p>
Q 7	MWV	Why do you think Ian behaves or treats you the way you are describing?
	KB	<p>I think Ian feels he has all the knowledge. I feel it's a power thing, it could be insecurity also, if others know everything then he does not need to be the one to go to and he may feel excluded.</p> <p>Ian holds onto things, so he has all the knowledge, so you have to go to him. This is frustrating as we are at 35% staffing capacity, and this is not helpful.</p> <p>I don't think he likes that I am 25 years old, younger than Ian and work at the same Grade as Ian.</p> <p>I have told him to stop commenting on my work negatively which is knocking my confidence, he continues to do so. It is not constructive the way that Ian is. I don't think he appreciates that I spoke to him, and he does not like it.</p>
Q 8	MWV	Can you explain how Ian makes you feel when undermining or questioning you in front of others?

	KB	<p>Awkward, I don't want to get angry in front of others, but I am angry, I don't want to react in front of others, I don't want to make things worse in front of others.</p> <p>I feel defeated and I don't want to come across as the same way that Ian is.</p> <p>I get on well with everyone else in the team and others say it is Ian being Ian and others will say why do you let him speak and say things to you in the manner that he does but I don't challenge as I don't want the confrontation but to others it may look like I am backing down and being cowardly.</p>
Q 9	MWV	How do you feel the relationship between Ian and you would be in the future?
	KB	After this I think non-existent, I feel that I could work in a professional manner if Ian is willing to come back to the team to work as and with the team rather than against the team, then I would be willing to work on a professional level as we don't have to be friends.
Q 10	MWV	Allocation of work. What is the process who allocates the queries, is there a TEAM inbox to pick up queries from?
	KB	<p>Yes and we are currently splitting the work across the team as we all have our own work area.</p> <p>There has been a query recently that Ian and Wendy had worked on. Ian did a further check on the case, Ian then sent it to me to call the client. Ian knows the process and sending it to me, so it now involves 3 people is not the process. Ian should have taken the query, dealt with the query and then called the client with the outcome. If he had done this it would have been dealt with quicker, my work is mounting up and this is an example of how Ian is putting more pressure on me. Ian knows the process.</p>
Q 11	MWV	Since Ian is now working in another team has Ian been asking you to do work?
		<p>Yes, he came to my desk and asked me to do something but that is not the process to follow. I would do it but it is not the way it should be done.</p> <p>Ian has sent queries to me which is not the correct process. Since submitting the grievance I have not had any more emails from Ian. Ian knows the process; he does make things difficult.</p> <p>I checked and he has not sent any work to anyone else. Just to me.</p>
Q 12	MWV	Do you feel there are other people we could interview on your behalf in relation to the grievance issues you have raised?
	KB	<p>Sophie knows how I feel. So does Wendy and Wendy can confirm that nothing has been sent to her from Ian and that it is just me.</p> <p>Keith was going to do some credits and he was going to use my training manual but Ian said not to as it will be wrong but I don't think Keith would have seen that as an issue.</p>

Q 13	MWV	In a supervision with Sophie, we understand you broke down and became upset can you confirm and explain this to me?
	KB	<p>I feel like Ian is singling me out as he is not sending things to Ben, Wendy or others in the team and I feel that Ian is working against us, it was more of a breakdown of frustration, he makes me feel like I am not doing my job fully.</p> <p>I felt I was giving 110% but Ian makes me feel like I am not giving my best. If Ian had been directing queries to others too, it may not have affected me but he is just sending me queries and overloading me.</p> <p>I do feel bullied and harassed by Ian, he is chipping away and has been doing so over a period of time.</p>
Q 14	MWV	Is there anything further you wish to add to your statement, or the questions posed today?
	KB	I may be being paranoid, but we are doing some work on the Living wage and we are working on the contribution calculations that Ian has previously done, i.e. the uplift to match the new rate on 9 Nov 2022. A case I was dealing with on Monday this week, Ian this week has changed the instruction and reverted it back to the old contribution. He is not currently working on things that our team deal with. I raised this with Sophie to get clarification to see if things have changed back to the old rate. Sophie and I do not know why Ian has done this, but Ian should not have been doing this. I sent it to Sophie and now we have to change it back again, I feel Ian has done this to undermine my work.
Q 15	MWV	Why do you feel paranoid?
	KB	I think if Ian sees my name against work, he knows that I am dealing with that query, I feel Ian has a manipulative tendency to make it look like I have done something wrong, this is making me feel paranoid.

I confirm that this is a true and accurate account of our discussion.

Date: 30/11/22

Signed: Kelsey Barnes