

2024 Staff Bonus Scheme Guidelines

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1. Purpose

The 2024 staff bonus scheme recognises and rewards exceptional contributions made by staff during 2023, in line with the University's Values. The scheme is designed to be rigorous, fair, transparent and objective.

Bonus payments will be based on the evidence provided and will comprise one of the following:

- A one-off non-consolidated bonus
- An additional pay increment (for those in the automatic incremental zone) or
- An increment into/within the contribution zone (for those no longer receiving automatic annual pay increments)

The one-off bonus may be either:

- A team award (i.e. a bonus payment for each team member for a shared contribution)
- An individual bonus

An additional pay increment will be available through this scheme for those individuals who have delivered exceptional performance in their role at a level that is above the usual role requirements, that has been sustained beyond one year and is reasonably expected to continue to do so on an ongoing basis.

2. Eligibility

Queen Mary employees in Grades 1-7 (and in equivalent clinical grades) are eligible to be considered for a bonus, provided they have no unexpired formal warnings on their file for either conduct or capability. An additional pay increment is not available for staff in clinical grades because their pay is set by the NHS.

Recommendations for a bonus may be made for those colleagues who have at least 6 months' continuous service with Queen Mary by the closing date for all nomination forms to be submitted by Heads of Schools / Directors to the Reward and Benefits team (Wednesday 7 February 2024).

Staff must still be employed by Queen Mary at the time of payment; no payments will be made for those who are no longer employed by the University.

To qualify for this year's bonus scheme, staff must have completed the following core mandatory training modules by Wednesday 7 February 2024 (the deadline for Heads of Schools / Directors to submit nomination forms to the Rewards and Benefits team):

1. Introducing Inclusion
2. Safeguarding Essentials (for those in student-facing roles)

Further details about Queen Mary's mandatory training, including links to the courses are available from Queen Mary's [mandatory training page](#).

3. Criteria for Awards

For a bonus application to be successful, it must demonstrate that the contribution meets the following criteria:

- Evidence of how the contribution is in line with the Values: Inclusive, Proud, Ambitious, Collegial and Ethical (please click [here](#) for further information)
- Evidence of what the contribution has delivered against at least one of the following criteria:
 - Substantially exceeding role requirements to complete a one-off or time limited task or service for customers or colleagues
 - Achievement of particularly challenging goals or objectives by individuals or teams, overcoming significant obstacles to ensure targets are met
 - Demonstration of exceptional flexibility by individuals or teams which contributed directly to the achievement of objectives
 - Development and delivery of innovative or creative new solutions that have impact
 - Exceptional personal responsibility/impact either as an individual or by a team as an example of good citizenship, inclusivity, or environmental sustainability
 - Delivery of work output(s), project(s) or initiative(s) that impacts beyond the usual scope of their role/grade or their area of responsibility
- Evidence of the impact of what has been delivered, in line with one or more of the following measures:
 - Improvements in services to customers and/or achievement of objectives in challenging circumstances
 - Positive feedback from customers and/or peers
 - Achievement of objectives in challenging circumstances
 - Legacy of initiative or contribution or cross-functional collaboration will be greater than one year
 - Demonstrable reduction in wastage or efficiency gains
 - Number of staff or students supported or benefiting from the activity
 - Financial savings or income generation
 - Risk mitigation accomplished
 - Scale and significance of activity is beyond usual area of responsibility
 - Duration of contribution e.g. 3+ months
 - Extent/scale of cross-organisation/team working with other parts of the organisation
 - Long-term upskilling of team that has an impact on future ways of working/projects

An additional pay increment (for those in the automatic incremental zone), or an increment into/within the contribution zone (for those no longer receiving automatic pay increments), may be considered where there is evidence of the longer-term impact of exceptional performance, at a level that is above the usual role requirements, sustained for longer than one year and reasonably expected to continue on an ongoing basis.

4. Application Process

Application forms are available on the [HR website](#).

Managers/Heads/Directors can nominate staff for a team/individual bonus or a pay increment, **or** staff may nominate themselves.

All applications for eligible staff will be considered provided that the relevant forms are:

- Completed in full and according to the guidelines, and
- Submitted by the published deadlines (as shown in section 8)

A bonus application for a member of staff can only be made either as an individual or as part of a team – not both.

If you are intending to self-nominate, you are encouraged to first discuss your application with your line manager. If your line manager does not support your application, they will explain the reasons for this decision. Applications must be supported by line managers to be taken further.

Where an individual or team is nominated by their Manager/Head/Director, the collation of evidence and/or completion of relevant sections of the form may be delegated to the individual/team.

All nominations must be made via the individual's own substantive Department, School, or Institute. A Department/School/Institute should not directly nominate individuals from other areas; this should be done in consultation with the substantive employing area who would submit a nomination if they considered it appropriate.

Only supported applications will be considered by the relevant Panel. A bonus application must be supported by both your line manager and your Head of Department/School/Institute (or for faculty professional and technical staff, your line manager and School/Institute Manager) for your application to be considered. Applications for those who are in Professional Services (or professional/technical career families within an academic School or Institute) must also be supported and counter-signed by the Professional Services Director or Faculty Director of Operations to be considered by the relevant Panel.

For bonus applications for senior faculty Professional Services staff such as School/Institute Managers, a Head of School/Institute Director may be invited to feed into the statements submitted by the Faculty Director of Operations.

The individual's application must be signed by the line manager with a statement outlining whether the application is supported or not, including the reasons why. Whether or not it is supported by the line manager, the application form should be forwarded to the Head of Professional Services Department (Assistant Director), Head of School, Institute Director, or School/Institute Manager (for faculty professional/technical services staff), for a consistency review across their Department/School/Institute.

The Head/Director/School Manager should comment on:

- The quality of the evidence provided
- The outcomes of contribution / performance discussions during the year
- Priorities and constraints within the team which may be relevant to the application

The Head of Department, Head of School, Institute Director or School/Institute Manager should discuss these comments with the individual/line manager. Applications for Professional Services staff (and professional/technical staff based in the faculties) must also be reviewed and counter-signed by their Professional Services Director or Faculty Director of Operations.

If the application is not supported, the reasons must be explained to the individual/team in a face-to-face meeting by the Head of Department, Head of School, Institute Director or School/Institute Manager. The faculty/departmental ER Manager or Strategic HR Partner will be able to provide guidance and support to line managers in conducting these meetings.

In order for us to monitor and further develop our bonus scheme, including our commitment to equality, diversity and inclusion, please send all applications, whether supported or not, to the Reward and Benefits team (rewardandbenefits@qmul.ac.uk) by Wednesday 7 February 2024.

5. Panels

Once the closing date for the receipt of all applications has passed, all applications will be reviewed and considered by the relevant panel for a bonus, as outlined below. Each panel's decisions will only be made based on the evidence provided in the application.

In each of the academic faculties, a Faculty Panel will be chaired by the Faculty Vice-Principal to consider applications for academic/research staff, and would normally include:

- Heads of School / Directors of Institute
- Faculty Deans
- Faculty Lead for Equality, Diversity, and Inclusion

Heads of School/Directors of Institute will be invited to present applications from their School/Institute to the panel. The Faculty Strategic HR Partner will attend in an advisory capacity.

For staff on Professional Services and Technical Terms and Conditions, there will be a review process involving members of the Professional Services Leadership Team (PSLT). This will entail 'buddying' members of the PSLT with one another to review bonus applications across operational areas, with a view to calibrating decision-making across Professional Services. It will be followed by an overall Professional Services Review Panel which will conduct an overview of all Professional Services applications. The Review Panel will include:

- Chief Operations Officer (Chair)
- Chief Governance Officer and University Secretary
- Chief Financial Officer
- Human Resources Director
- Head of Equality, Diversity and Inclusion, or Equality, Diversity, and Inclusion Manager

After the Faculty and Professional Services Panels have met, there will be an overall University Calibration process, which will be led by a Vice-Principal who has not been involved in the Panels. The purpose is to conduct an overall review of the decisions/outcomes and an

equalities impact assessment. The calibration process will also identify any lessons learned to guide and inform any changes to the next Staff Bonus round.

The Chairs of all panels will ensure:

- all applications are given due consideration
- confidentiality is maintained
- integrity in the decision-making process by following due process
- the Panel's decisions regarding whether bonuses meet the criteria are based on the evidence provided, and are consistent, fair and transparent

The Reward and Benefits Manager will attend panel meetings to provide advice and to help ensure a consistency of approach. The Reward and Benefits Administrator will attend panel meetings to record the decisions.

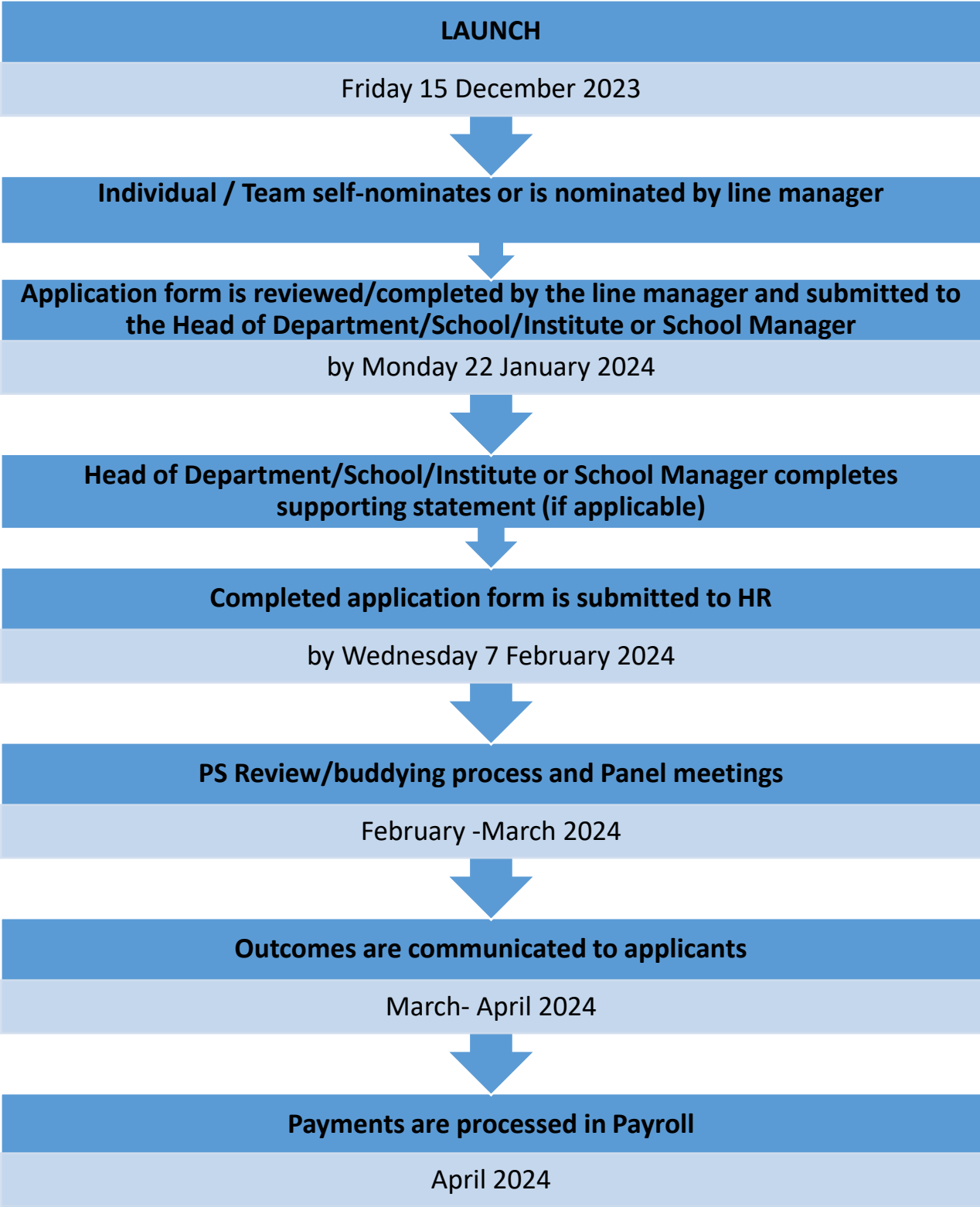
6. Notification of decisions

Line Managers/Heads/Directors are responsible for providing feedback on unsupported applications. The Reward and Benefits team will prepare and issue letters communicating the decisions from the panels. Heads/Directors will be advised of the outcome and rationale from Bonus Panels, to provide verbal feedback to both successful and unsuccessful applicants.

7. Appeals

An applicant not awarded a bonus or increment who is dissatisfied following feedback has a right of appeal **only on the grounds of a defect in procedure**. Those awarded a bonus or increment have no right of appeal. An appeal must be submitted in writing, setting out the grounds for appeal, and sent to the Human Resources Director within 14 days of receiving the outcome.

8. Timetable



9. Frequently Asked Questions

Why does the scheme exist?

As part of the total reward package, Queen Mary has an annual staff bonus scheme to thank and reward those who have significantly exceeded expectations in the contributions they have made to Queen Mary during the past year, in line with the University Values.

Who can apply?

The scheme is open to all Queen Mary employees in grades 1-7 and equivalent clinical grades with at least 6 months' service, provided they have no unexpired formal warnings on their file for either conduct or capability.

How do I apply?

You can download an application form from the HR website. You should discuss your application with your line manager and obtain their sign-off. This needs to be done in sufficient time for the line manager to email it to your Head of Department/School/Institute by the deadline of Monday 22 January 2024.

How many applications am I able to submit?

Individuals can only submit one application – either one individual application **or** one team application but not both.

When do I need to apply by?

Applications need to be fully completed, reviewed/agreed by the line manager, and sent to the Head of School, Institute Director, or Head of Department by Monday 22 January 2024.

Who makes the decisions?

Decisions on supported applications will be made at the relevant panel meeting. Where there is not a consensus amongst the Panel, the Chair of the Panel will make the final decision. After the Faculty and Professional Services Panels have met, there will be an overall calibration process, to conduct an overall review of all decisions and an Equalities Impact Assessment.

How and when will bonuses be paid?

Successful applicants will receive an award in the form of a one-off bonus payment or a pay increment. Payment is planned to be made in the April 2024 payroll, provided all panels have met and the calibration process has been concluded in time.

What constitutes exceptional performance and how do I evidence it?

Exceptional performance must be evidenced against the criteria set out in section 3 of the guidelines: development and delivery of innovative or creative new solutions; exceptional personal responsibility either as an individual or by a team as an example of good citizenship; or delivery of work activity or initiative that is beyond the usual scope of the role or their area of responsibility. The application should also include how the contribution has been delivered in line with University Values, not just what has been delivered. Please click on this link for further details on the [Values in action](#).

What evidence can be provided?

You do not need to provide appraisal documentation, but you can provide paragraphs from it. For example, you can include evidence of meetings, compliments from customers and other types of evidence to support your application. Please provide all evidence within the application form, limiting it to a total of 1 page.

How much bonus will I get?

There will be one level of bonus for those successful for a team bonus award and one level of individual bonus award. The exact bonus payment amounts will be determined once all bonus applications have been considered by the panels using the criteria.

I am a line manager – what is my role in the process?

Your role is to build awareness of the Bonus Scheme within your team (e.g. via team meetings, one-to-ones, appraisal conversations etc.) and to decide whether you wish to nominate any individuals and/or teams. Please be prepared to help individuals with their applications and confirm that the evidence provided is a true reflection of events i.e. it is factually correct.

Sign-off and forward all applications from your staff, whether supported or not, to your Head/Director/School Manager by Monday 22 January 2024. Provide feedback to the applicant(s) where you consider that they do not meet the criteria. Where you have nominated individuals, complete the application form. Ensure that you discuss the application with the individual/team and the Head/Director/School Manager.

After the applications have been considered you may be asked to provide feedback to individuals/teams as requested by your Head/Director/School Manager.

I am a Departmental/School/Institute Head – what is my role in the process?

Your role is to facilitate the process from launch date to when applications are submitted to HR. You can do this by cascading the information in your department and communicating the application deadline. You should also ensure all forms, whether supported or not, are checked, fully completed and emailed to rewardandbenefits@qmul.ac.uk by Wednesday 7 February 2024.

Where applications have not been supported by you, please provide constructive feedback to the applicant(s) and/or line manager, as appropriate.

Will I still receive my automatic pay increment in August if I am successful in receiving a bonus or pay increment through the Staff Bonus Scheme?

Yes, you will.