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Dear Colleague

Mathematical Institute Merit Review Exercise 2008-9

The University's merit review scheme for academic-related administrative, academic-related research (including departmental lecturers) and university support staff is designed to reward employees who have demonstrated exceptional performance. I am writing to let you know that we are starting the department's merit review exercise for the period 1 August 2008 to 31 July 2009. I will be asking supervisors to consider all the staff (in grades 1 to 10) that they manage and to make recommendations to the department's review panel. I expect that the review will be complete by 12 October and any awards will be actioned in the October or November payroll.

I attach some information about the scheme, which I hope will answer any questions you may have, but you can of course talk to your supervisor or with Rosie or Brenda if you would like further information.

As the scheme is designed to reward consistently excellent performance, and the availability of funding is limited, it is not possible to recognise all those who consistently do their jobs well, but this does not mean that such individual contributions go unnoticed. May I take this opportunity to thank you for your work on behalf of the department this.

Yours sincerely

N M J Woodhouse

Mathematical Institute Merit review exercise 1 August 2008 – 31 July 2009

Who will be reviewed?

All members of the academic-related administrative, academic-related research (including departmental lecturers) and university support staff in post on 31 July 2008 are eligible to be considered for a merit award, except for 1) clinical consultants, who are reviewed under the NHS scheme, 2) 'red-circled' staff and 3) staff with less than six months service and 4) apprentices. Payments to staff with less than one year's service would be pro-rata.

How will I be reviewed?

Your supervisor will review your work performance over the past year using the attached criteria which are set by the University's Personnel Committee. If your supervisor decides to recommend you for an award, he/she will be asked to complete a form and give examples of how your work has met the criteria sufficiently for an award to be recommended. Your supervisor will discuss any recommendations with you and give you a copy of the recommendation form.

Your supervisor's recommendation will then go forward to a department panel comprising the Head of Department (Nick Woodhouse), the Head of Administration and Finance (Rosie Mortimer) and two senior members of the department (to be notified) who will consider all the applications against the University criteria. Please note that it is not always possible to make an award to all those who are recommended.

What are "awards"?

There are three types of award that can be made: **non-recurrent award, recurrent award, or team awards.**

A non-recurrent will normally be made where performance over the review year is judged to have been exceptional for a particular reason, for example you might have undertaken a particular project which is now completed. A non-recurrent award is a lump sum payment equivalent to 3% of your annual salary, which is the difference between one incremental point and the next on the salary scale. This type of payment is not superannuable and cannot retrospectively alter overtime payments, but is subject to deductions for tax and National Insurance.

A recurrent award will normally be considered where performance is judged to have been consistently excellent over a sustained period of time (usually more than one year), **and** is expected to continue at that level for the foreseeable future. If you were to receive a recurrent award you would move up one incremental point on your salary scale with effect from 1 August this year. To recognise the excellent performance over the previous year a lump sum payment would also be made equivalent to having been moved up by one incremental point from 1 August last year. This backdated payment is not superannuable, nor will it retrospectively alter any overtime payments earned during the period covered. It will, however, be subject to deductions for tax and National Insurance.

A team award will be considered where a team have jointly demonstrated exceptional performance, for example completing a team project successfully. Team payments may be in the form of a payment equivalent to an increment (as for non-recurrent payments), in which case each person might receive a different amount, or a lump sum payment of the same amount to each member of the team.

What is the timescale for the scheme?

In order to be considered by the department's review panel individual applications should be received by **16 September**. Supervisors' recommendations must be received by **28 September**. It is expected that the merit review decisions will be available by 12 October.

Can I recommend myself for an award?

If you feel that you have demonstrated consistently excellent performance over the past year, you should discuss this with your supervisor in the first instance. You may, if you wish, make a personal application on the individual application form which is attached. Your supervisor will be asked to verify your application form.

How will I hear the outcome of the review?

You will be told whether or not the panel has made you an award. A brief summary report, which will not identify individuals, will be posted on the departmental notice board.

What should I do if I think my job has changed significantly in the past year?

The merit review is not intended to be a substitute for regrading and if you consider that your job has changed substantially and that the grade may no longer be appropriate, you should discuss with your supervisor/Administrator whether a regrading exercise may be more appropriate.

I have taken on some temporary additional responsibilities at a higher level due to the absence of another member of the department, will I get an award?

Where one member of staff takes on additional duties to cover the temporary absence of another member of staff who works at a higher grade then there is a mechanism for awarding an "acting-up allowance" to cover such additional responsibility. In such circumstances an acting-up allowance should be considered before a decision to make a merit award, and you should discuss this with your supervisor/Administrator if you feel this may be appropriate.

What should I do if I'm unhappy at the outcome of the review?

If you are unhappy with the decision made by the panel in the first instance you should discuss your concerns with your supervisor. If the matter cannot be resolved informally, you may use the grievance procedure to address the matter.