



PS Connect

AB Managers Guide 2023

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The University of Exeter Recognition Scheme

About the Scheme

We like to recognise the hard work, commitment and achievements of all staff, individually and as part of team, through a fair, flexible, responsive and transparent recognition scheme.

We also want to encourage everyone to say thank you more often! Simply saying thanks, or sending a thank you card, as well as more formal appreciation from a manager makes everyone feel more valued.

Staff grades B – H are eligible for awards.

The scheme provides for “Bronze” voucher awards and “Silver” cash awards. The Bronze and Silver awards can be made in-year so that excellent performance is appropriately recognised promptly after achievement.

Use of the reward budget

At the beginning of each financial year, the budget for Above and Beyond is set by Finance Services, at 1% of the staff budget for each Faculty/Division plus national insurance.

Each Faculty/Division decides how much of their budget will be allocated for Bronze (voucher) awards through the online portal and the amount that they will use for Silver awards.

The Bronze awards processed through the portal are deemed taxable benefits by HMRC but to avoid the value of the award to the employee being reduced by income tax and national insurance contributions, this liability is met by the University (using a PSA agreement with HMRC). In budgeting the spend, Faculties/Divisions need to be aware of the additional costs of the tax/national insurance (that would otherwise be paid by the employee), together with the administration costs charged by Sodexo, which runs the scheme on the University’s behalf. (These oncosts are approximately 56.5% for tax/NI and 12.2% administration fees. We are now using an eVoucher option which gives greater security and reduces administration costs.).

The value of the rewards will be as follows:

- Bronze awards through the portal can be for £25, £50, £100, £250 and £500. These are not subject to any deduction for Tax or National Insurance.
- Silver cash awards made through payroll can be for £750, £1000, £2000, £3000, £4000 (providing they are less than 10% of salary). These will be subject to the standard PAYE deductions (Tax and National Insurance). Payments will be made net of the deductions to the nominee.

Faculty Executive Groups and Professional Services leaders continued to have discretion about which achievements should be rewarded. Colleagues are eligible to receive more than one award if this is considered appropriate.

University Strategy and Values

Rewards made for Bronze through the Above and Beyond Scheme portal and the Silver awards made via payroll should reflect the University Values.

- **Discovery:** we thrive on imagination and creativity to make new discoveries and to innovate in our ways of working.
- **Respect:** we respect our community and our environment, and we build trust and wellbeing by showing kindness.
- **Excellence:** we seek to excel and deliver the very best in everything that we do.
- **Inclusion:** we welcome and champion diversity to create a sense of belonging so that everyone is valued.
- **Community:** we work best when we collaborate to deliver shared priorities and goals

Processes

Process for making a Bronze award via the portal

The online portal is available to enable Bronze awards to be made. A quick start guide on how to access the portal and make an award can be found [Above and beyond | Benefits, rewards and recognition | University of Exeter](#).

Process for making a Silver cash award

Silver Cash awards are made through payroll and paid at the end of the month with the nominated person's pay.

- Nominations should be discussed by the Senior Management Team for each Faculty/Division.
- An audit of the reasons for the award should be kept.

Nomination process

- Managers make nominations by completing the [Above & Beyond Award Nomination Form](#), detailing the employee being nominated, their Trent details (Employee Occupancy Reference), the amount of the nomination and the reason for the award.
 - For dual roles, an alternative line manager can be specified on the form where different to the details recorded on Office 365 or Teams Who app.
- On submission, the nomination is automatically added to a SharePoint list.
 - If the employee or the dual role line manager email address is invalid, the nomination will be rejected and will need to re-submitted on a new form with the correct details.
- Access to the nomination is given to the HoD for the department, their Department Manager (where specified) and the Faculty/PS Division member of staff who is responsible for managing Silver awards in the Faculty/PS Division.
 - The details of the HOD and Department Manager is held in a HOD SharePoint List (HOD Contacts).
 - The details of the Faculty/PS Division staff member responsible for managing the Silvers Awards is held in a Faculty SharePoint List (CONTACTS for Power Automate)
- In addition, where specified on the Faculty/PS Division (CONTACTS for Power Automate) SharePoint List, members of the SMT will be assigned view only access to the nominations.
- A default budget code will automatically be derived, but can be changed if required:
 - The default budget centre will be derived based on the information held in the Faculty/PS Division (CONTACTS for Power Automate) or HOD SharePoint List (HOD Contacts) depending on whose budget the nomination is being funded from.
 - The default nominal codes will be derived from the Job Family selected on the form. It will be set to the Trent value, which is different to Finance. Finance will change.

Job Family	Trent Nominal	Finance Nominal
Research	21205	21230
Professional Services	21305	21330
Education & Research (E&R)	21005	21030
Educations & Scholarships (E&S)	21005	21030

- The budget code is then set as '00000000000' + budget centre + Trent nominal code

- Once the nomination has been added and access assigned, the Faculty/PS Division AB Award contact or HOD for the department (copying the Department manager) is notified via email.
- Where requested, the Faculty/PS Division AB Award contact will also be notified about any Department funded nominations.

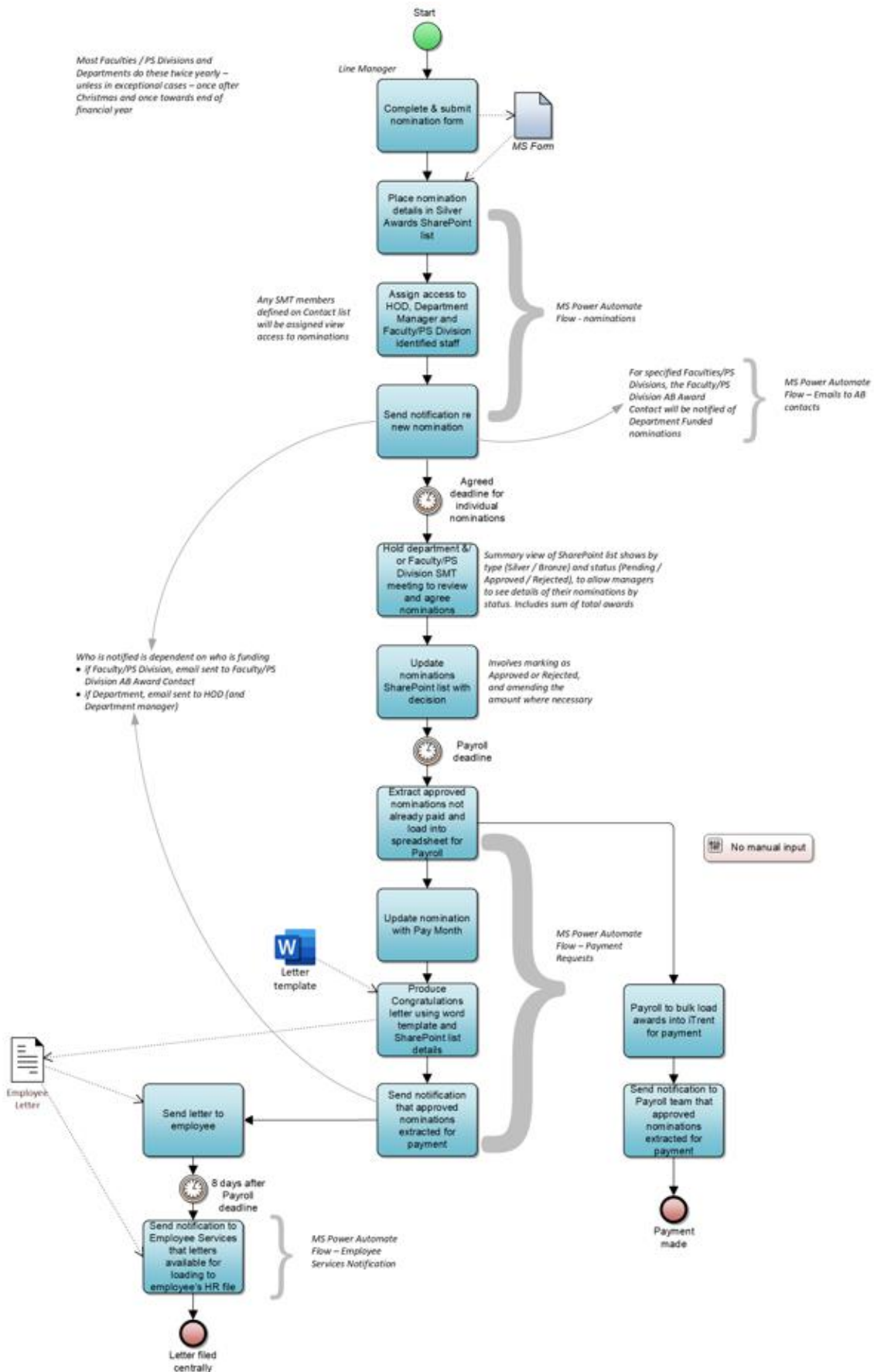
Approval process

- The nominations will then be reviewed at Department and/or Faculty/ Division level depending on the individual defined processes.
 - A Summary SharePoint view is provided – by type (Silver / Bronze) and status (Pending / Approved / Rejected) – to allow managers to see details of their nominations by status
- Once agreed, the SharePoint list item must be updated with the outcome – Approved or Rejected. Changes can also be made to the monetary amount.
- Employee Occupancy Reference and Grade are not mandatory fields on the form but must be completed before the nomination status is updated.
- All of the above must be completed by the Payroll Deadline.

Payroll process

- Once the Payroll deadline has passed (the day after), all approved nominations not already paid are extracted into a payroll spreadsheet.
 - This payroll spreadsheet will be in a csv format that can be uploaded directly into Trent for payments to be made.
 - The SharePoint List items will be updated to reflect that the approved nomination has been extracted for payment, with the month & year being added into the Pay Month field.
- A letter template will be used to create the employee specific congratulations letter using the information in the SharePoint List.
 - A personalised message will have been provided as part of the submission and this will be included in the Employee's congratulation letter.
 - The Faculty/PS Division AB Award contact or HOD (and Departmental Manager where applicable) will be notified that approved nominations have been extracted and the letters can be sent. The letter can be amended before sending if required.
 - To see the populated letter the document must be opened in the word application.
- 8 days after the payroll deadline, an email will be sent to inform Employee Services that the letters are available to upload to the employee's HR file in Trent.
 - An email will only be sent if there are letters to be uploaded.
 - It is no longer necessary for the Faculty/PS Division Department/Service to send a copy of the letter to the Employee Services team.

Flow



Congratulations Letter Template

Private & Confidential

[Employee_Name]

[Earned_Date]

Dear [Employee_GivenName],

Congratulations

It gives me great pleasure to write to inform you that you have been awarded an Above and Beyond Silver award of £[Award_Amount] in recognition of your achievements over the last year. We are arranging for this award to be paid with your salary at the end of the month.

[Requestor_Name] wanted to recognise you personally for your outstanding performance. [Personalised_Message]

Many congratulations on your award and thank you once again for your hard work and dedication.

Your sincerely

[Director]

pp [Director]
[Director_Title]



APPENDIX A

Above and beyond: web guidance of award values

(from www.exeter.ac.uk/staff/benefits/reward/aboveandbeyond/managersguidance)

Category of Awards	Who can nominate?	Timing of Award	Type of Award	Approval
Thank you	Anyone	At any time	eThank You cards and certificates	None – card gets sent straight after making the nomination
Bronze	Line Managers Colleague-to-colleague nominations	Can be awarded at any point throughout the year	eVouchers - £25, £50, £100, £250 and £500	Above and Beyond Budget holder
Silver	Line Managers	Can be awarded at any point throughout the year	Cash - £750, £1000, £2000, £3000 and £4000 (providing they are less than 10% of salary)	PVC/Director of Professional Services Division

Example of some bronze case studies

- £25 award: "Extra care and attention spent on ensuring facilities were of a high standard. The detail the nominee went to is more than expected and they did a great job which often goes unappreciated"
- £50 award: "Organising a teaching programme which was exceptionally tricky, with major changes having to be made only days before the start of term, your ability to solve a range of highly difficult logistical challenges and to do so with calm and good humour"
- £100 award: "For successfully bringing together colleagues from all aspects of the University to explore the synergy between research and education. The feedback from participants were overwhelmingly positive"
- £250 award: "For diligence and meticulousness, highly valued by colleagues and for all the extra work that has been taken on, overseeing the team's finances, this year has provided stability and reassurance during a challenging time"
- £500 award: "For expertly leading the development of a number of high-profile research initiatives during the academic year, Showing exceptional organisational, project management and communication skills, all initiatives were successfully implemented on time"