

## PERSONNEL SERVICES

University Offices, Wellington Square, Oxford OX1 2JD  
 Director of Personnel and Administrative Services



To: heads of departments and institutions, faculty board chairmen,  
 departmental administrators and faculty board secretaries

Ref. EMS/5, EMS/6,  
 EMS/6/ADM

cc. heads of division, divisional secretaries; Dr Gambles, Mr Shaw,  
 Principal Administrator of the Conference of Colleges

16 April 2010

### Suspension of the merit review scheme for university support and academic-related staff

*After careful consideration, and consultation with a cross-section of departmental administrators and the joint committees with staff representatives, the Personnel Committee has decided to suspend the merit review scheme for university support and academic-related staff with immediate effect and for an initial period of two years. There will be no merit pay exercise in 2010.*

*The Personnel Committee has agreed to review the position after two years in the light of both the financial situation and of any operational issues that might emerge, with an interim review after 12 months.*

#### 1. Action required of departments and divisions

Departments are asked to note that:

- (i) the merit pay scheme for academic-related and support staff is **suspended** with immediate effect. There will be no merit review exercise in 2010;
- (ii) there is no effect on staff currently in receipt of a recurrent merit increment;
- (iii) in line with existing policy, departments continue to be able to **recruit** to the discretionary salary points, and to pay additional increments to existing staff on grounds of **retention**;
- (iv) Personnel Services will continue to carry out regular equal pay audits to ensure that unjustifiable inequalities in pay do not arise, and will address any individual anomalies on an *ad hoc* basis; and
- (v) further rounds of the discretionary pay arrangements for professors and for staff in ALC6 are similarly suspended. In Trinity Term, the Task Force on Academic Employment will be presenting to Congregation proposals on a new structure for merit pay and titles for lecturers but there is no budget for any merit pay exercise for lecturers in 2010-11. Should the proposals be approved by Congregation, the next general exercise to recognise merit amongst lecturers will therefore only involve the conferment of the title of professor.



## 2. Background

The present process for the University's annual gathered field merit review for support and academic-related staff has been in place since 2001. In recent years, as the financial position of the University has become more difficult, the number of merit awards has reduced (although total additional annual expenditure across the University in relation to the scheme has still tended to be of the order of £1 million). As a consequence, a number of departments and divisions have increasingly come to question the appropriateness of the scheme.

In view of the difficult and uncertain financial position of the University, consideration has been given to controlling various aspects of discretionary expenditure, not least to safeguard jobs. Following consultation with a cross-section of departmental administrators, and the joint committees with the recognised trade unions, the Personnel Committee has agreed suspend the merit pay scheme for two years. It will review the position after two years in the light of both the financial situation and of any operational issues that might emerge, with an interim review after 12 months.

Any member of staff already in receipt of a recurrent merit award will continue to receive it.

Consideration has also been given to the development of *ad hoc* arrangements to enable departments to recognise exceptional merit during the suspension of the annual gathered field exercise. A recent equal pay audit has shown that there are no significant pay anomalies, and therefore it has been decided that no *ad hoc* arrangements will be put in place as they might give rise to inconsistency in practice. However, should any individual pay anomalies arise (for example, as a result of the award of recruitment or retention increments) departments and divisions should discuss these with Personnel Services.

The Personnel Committee is mindful of the concerns expressed by staff representatives that all staff groups should be treated equitably. In view of the difficult financial situation, the biennial discretionary pay exercises for professors and ALC6 staff have also been suspended for the time being. The proposals for merit pay and titles for lecturers which have been developed by the Task Force on Academic Employment, and which will be presented to Congregation in Trinity Term, have a zero budget for merit pay for lecturers in 2010-11. If the proposals are approved by Congregation, the next general exercise will therefore consider only applications for the conferment of the title of professor.

## 3. Increments for recruitment and retention

In line with existing policy, departments continue to be able to recruit within the discretionary range and award additional increments to existing staff on the grounds of retention. In addition, departments are encouraged to consider more creative (non-financial) ways to recognise the exceptional achievements of their staff.

JEREMY WHITELEY

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Web site: [www.admin.ox.ac.uk/ps/managers/circular](http://www.admin.ox.ac.uk/ps/managers/circular)