Compensation and Increment Reviews in INSPIRE Version 4

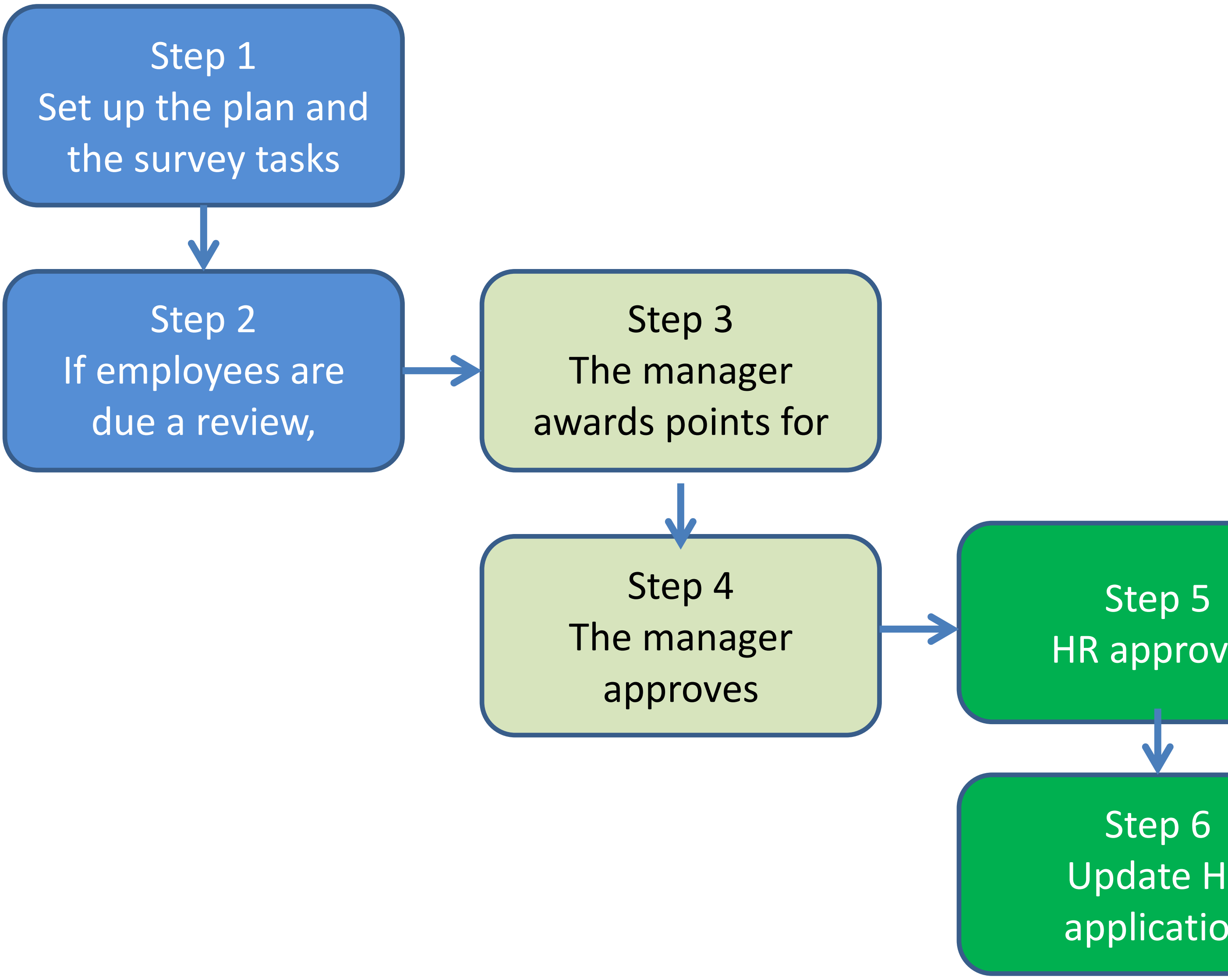
Introduction

Relating salary increments to performance is a good way of setting out expectations for employees at the beginning of the year. The benchmarks should of course be achievable but it is much more important for employees to see and understand the road map.

Within INSPIRE you can set out the roadmap with some clear overall guidelines. For example you might decide as an organisation that employees *must achieve an overall rating of 60% to ensure an annual increment.* If an employee is hovering on the borderline and is aware of that there is a big incentive to put in an effort to get beyond the borderline during the year.

Better to have good performance this year than tears next year!

Six Simple Steps

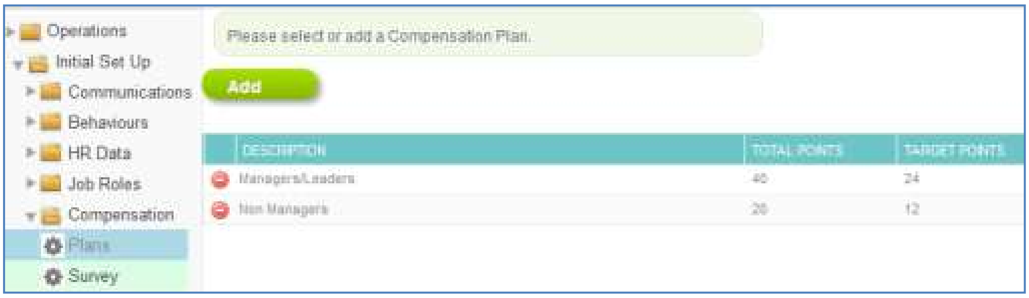

Step 1
Set up the plan and the survey tasks
Step 2
If employees are due a review,
Step 3
The manager awards points for
Step 4
The manager approves
Step 5
HR approv
Step 6
Update H
applicatio

Note: The examples in the following screens are from test/demo data and do not represent real people.

STEP 1

Compensation Plans

You can set up as many Compensation Plans as you like, for example:



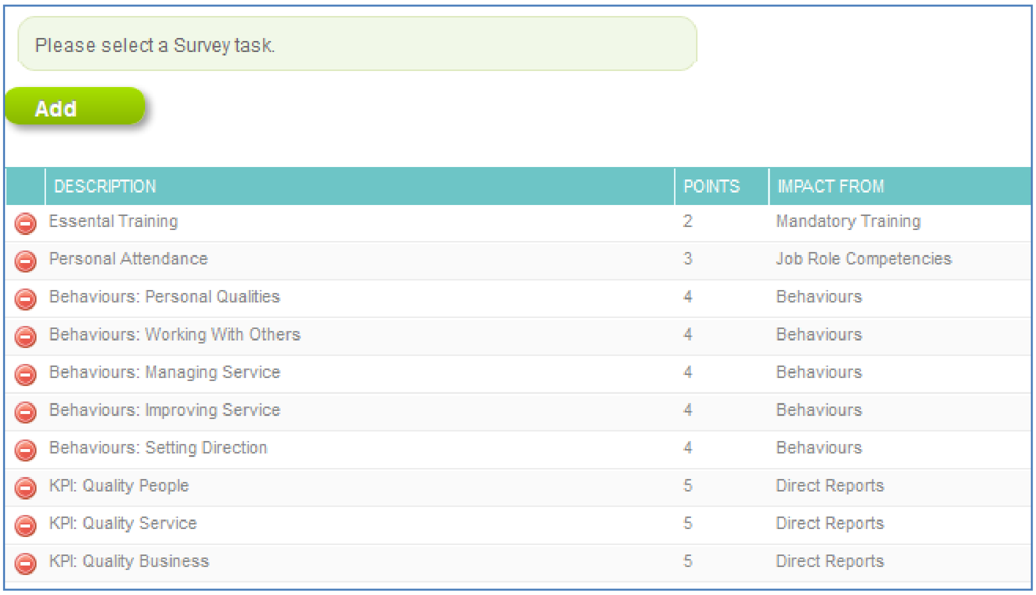
Please select or add a Compensation Plan.

	DESCRIPTION	TOTAL POINTS	TARGET POINTS
⊖	Managers/Leaders	40	24
⊖	Non Managers	20	12

In the example above for “Managers/Leaders” the total points are 40 made up of several survey benchmarks. The target to receive an increment is 24 i.e. 60% overall.

Compensation Survey

For each Compensation Plan you can set up a series of benchmarks. Here is an example of the Compensation Plan for “Managers/Leaders” above.

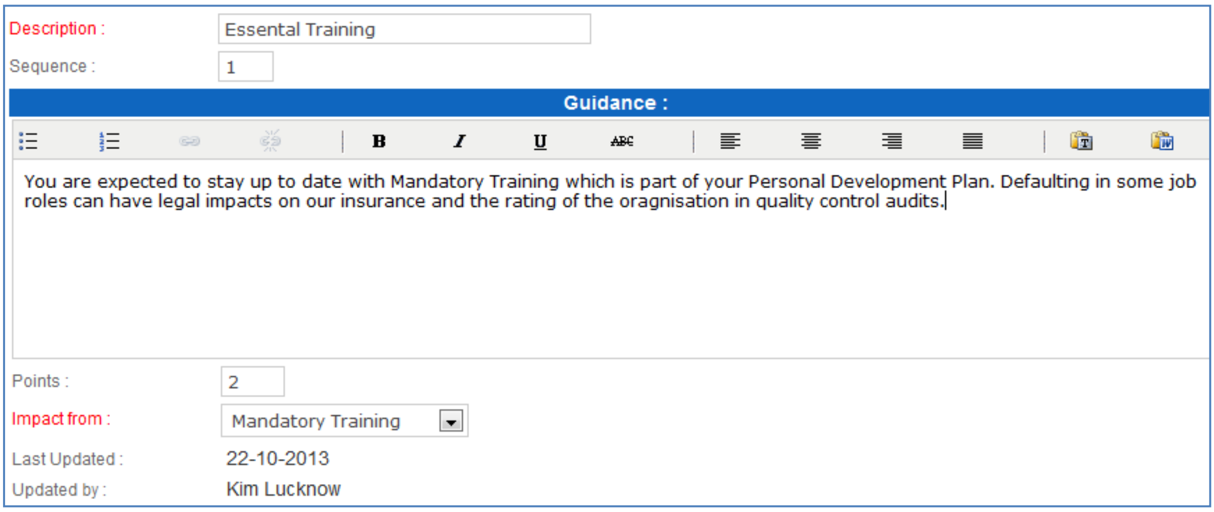


Please select a Survey task.

	DESCRIPTION	POINTS	IMPACT FROM
⊖	Essental Training	2	Mandatory Training
⊖	Personal Attendance	3	Job Role Competencies
⊖	Behaviours: Personal Qualities	4	Behaviours
⊖	Behaviours: Working With Others	4	Behaviours
⊖	Behaviours: Managing Service	4	Behaviours
⊖	Behaviours: Improving Service	4	Behaviours
⊖	Behaviours: Setting Direction	4	Behaviours
⊖	KPI: Quality People	5	Direct Reports
⊖	KPI: Quality Service	5	Direct Reports
⊖	KPI: Quality Business	5	Direct Reports

There are 10 benchmarks or tasks indicating the importance that the organisation places on each benchmark.

Creating/Changing a benchmark



Description : Essental Training
Sequence : 1
Guidance :
You are expected to stay up to date with Mandatory Training which is part of your Personal Development Plan. Defaulting in some job roles can have legal impacts on our insurance and the rating of the oragnisation in quality control audits.
Points : 2
Impact from : Mandatory Training
Last Updated : 22-10-2013
Updated by : Kim Lucknow

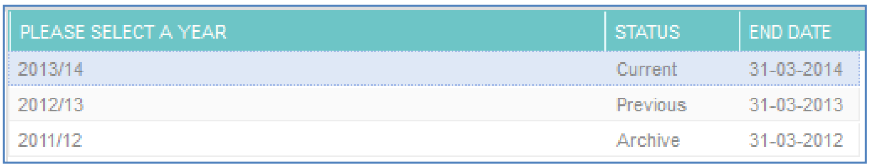
There are several decision points here:

- The Sequence Number is used to order the display of the benchmarks. If this ties in with documentation or guidance then keep the benchmarks in the same order.
- You can input text to explain the importance of the benchmark.
- Input the maximum points for the benchmark.
- The benchmark may be dependent on an area of people management such as:
    - Behaviours
    - Objectives
    - PDP
    - Skill Competencies
    - Mandatory Training
    - Job Role Competencies
    - Direct Reports
    - None of the above
- You will see later that the link here can help the manager to deep dive into the underlying information and review it before awarding points.

Step 2

Review Dates

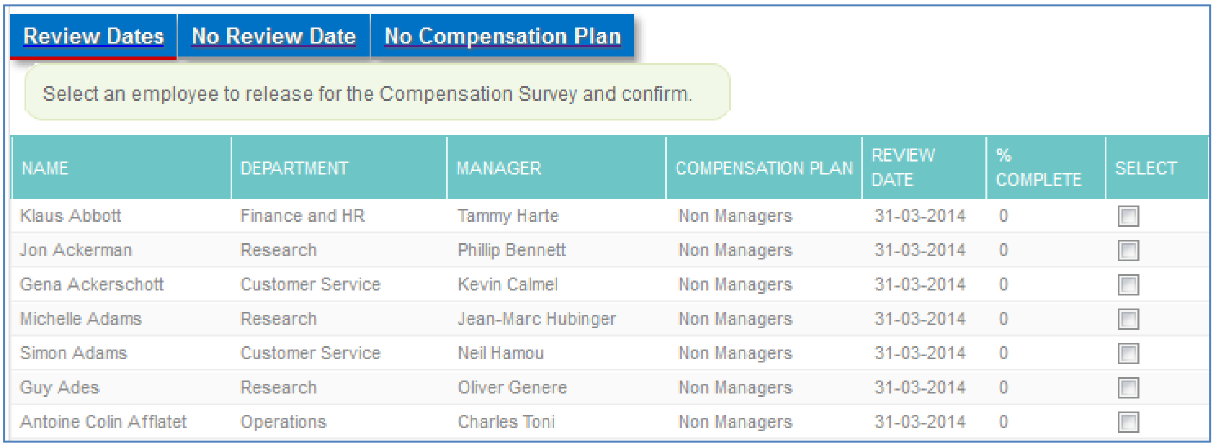
Each employee included in the scheme should have a **Compensation Plan** and a **Review Date**. If there is no Compensation Plan or Review Date then the employee is not included in the scheme. Note that the setup and review is all monitored within the selected Year:



PLEASE SELECT A YEAR	STATUS	END DATE
2013/14	Current	31-03-2014
2012/13	Previous	31-03-2013
2011/12	Archive	31-03-2012

The following intervention screens will help you to see the status of the workforce.

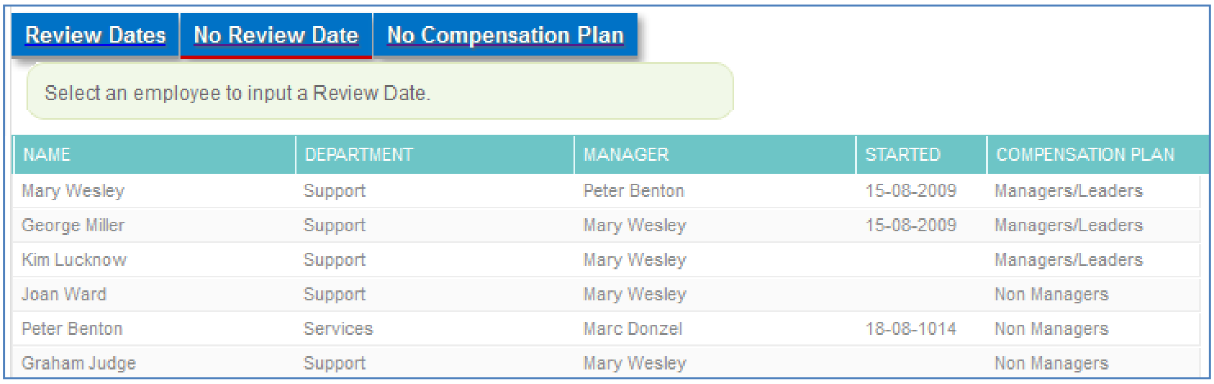
1. These employees have Compensation Plans and Review Dates. They are due a review. To include them in a Review select the employee and confirm.



Select an employee to release for the Compensation Survey and confirm.

NAME	DEPARTMENT	MANAGER	COMPENSATION PLAN	REVIEW DATE	% COMPLETE	SELECT
Klaus Abbott	Finance and HR	Tammy Harte	Non Managers	31-03-2014	0	☐
Jon Ackerman	Research	Phillip Bennett	Non Managers	31-03-2014	0	☐
Gena Ackerschott	Customer Service	Kevin Calmel	Non Managers	31-03-2014	0	☐
Michelle Adams	Research	Jean-Marc Hubinger	Non Managers	31-03-2014	0	☐
Simon Adams	Customer Service	Neil Hamou	Non Managers	31-03-2014	0	☐
Guy Ades	Research	Oliver Genere	Non Managers	31-03-2014	0	☐
Antoine Colin Afflatet	Operations	Charles Toni	Non Managers	31-03-2014	0	☐

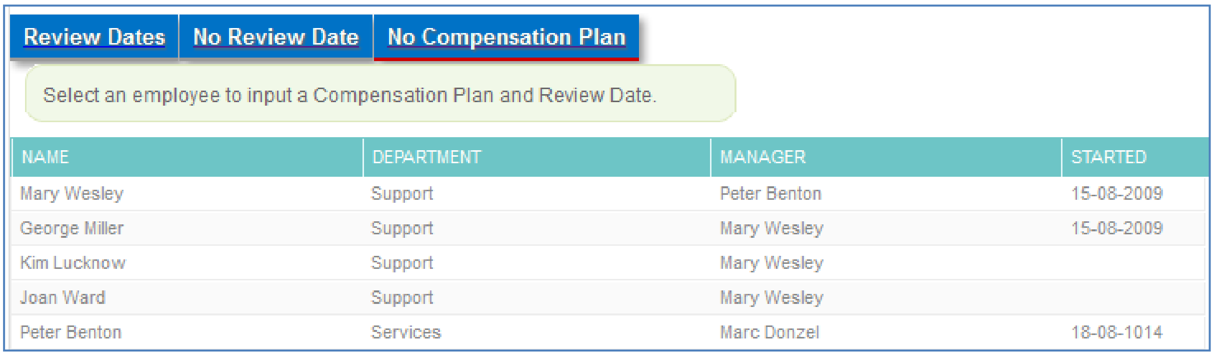
2. WARNING: These employees have a Compensation Plan but no Review Date



Select an employee to input a Review Date.

NAME	DEPARTMENT	MANAGER	STARTED	COMPENSATION PLAN
Mary Wesley	Support	Peter Benton	15-08-2009	Managers/Leaders
George Miller	Support	Mary Wesley	15-08-2009	Managers/Leaders
Kim Lucknow	Support	Mary Wesley		Managers/Leaders
Joan Ward	Support	Mary Wesley		Non Managers
Peter Benton	Services	Marc Donzel	18-08-1014	Non Managers
Graham Judge	Support	Mary Wesley		Non Managers

3. WARNING: These employees are not on a Compensation Plan, and that could be for a good reason – temporary employees, new starters etc.



Select an employee to input a Compensation Plan and Review Date.

NAME	DEPARTMENT	MANAGER	STARTED
Mary Wesley	Support	Peter Benton	15-08-2009
George Miller	Support	Mary Wesley	15-08-2009
Kim Lucknow	Support	Mary Wesley	
Joan Ward	Support	Mary Wesley	
Peter Benton	Services	Marc Donzel	18-08-1014

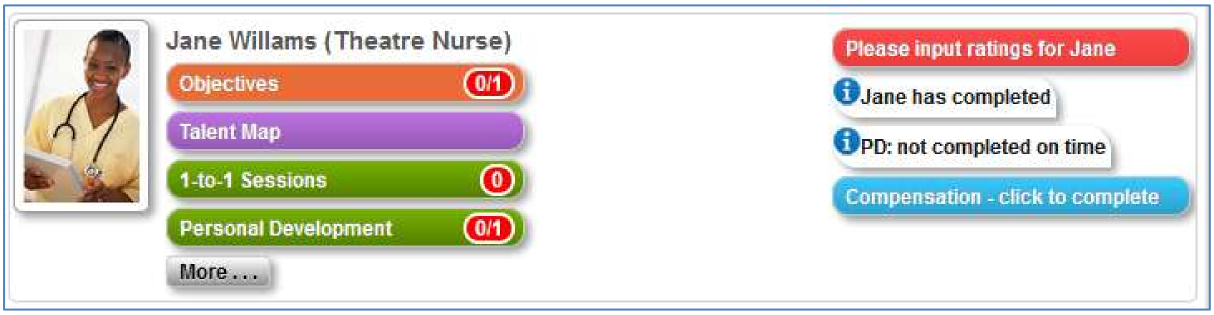
Step 3

Manager is alerted on “My Team”

When an employee is flagged for a Review the manager is alerted. The Manager sees the alert on “My Team.”

Here we have several employees at different stages:

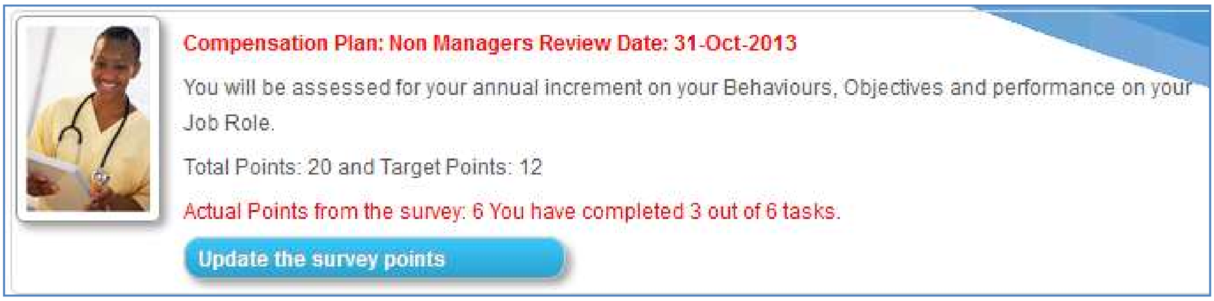
1. Due but no action from HR:
2. The Manager has not completed yet
3. Waiting on HR approval



Jane Willams (Theatre Nurse)

Objectives 0/1
Talent Map
1-to-1 Sessions 0
Personal Development 0/1
More . . .
Please input ratings for Jane
Jane has completed
PD: not completed on time
Compensation - click to complete

The Manager clicks on **“Compensation – click to complete”** and sees the summary:



Compensation Plan: Non Managers Review Date: 31-Oct-2013

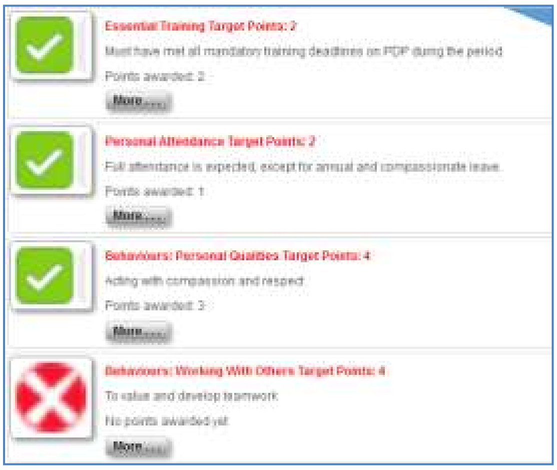
You will be assessed for your annual increment on your Behaviours, Objectives and performance on your Job Role.

Total Points: 20 and Target Points: 12

Actual Points from the survey: 6 You have completed 3 out of 6 tasks.

Update the survey points

The Manager clicks through to **“Update the survey points”:**



Essential Training Target Points: 2

Must have met all mandatory training deadlines on PDP during the period

Points awarded: 2

Personal Attendance Target Points: 2

Full attendance is expected, except for annual and compassionate leave.

Points awarded: 1

Behaviours: Personal Qualities Target Points: 4

Acting with compassion and respect

Points awarded: 3

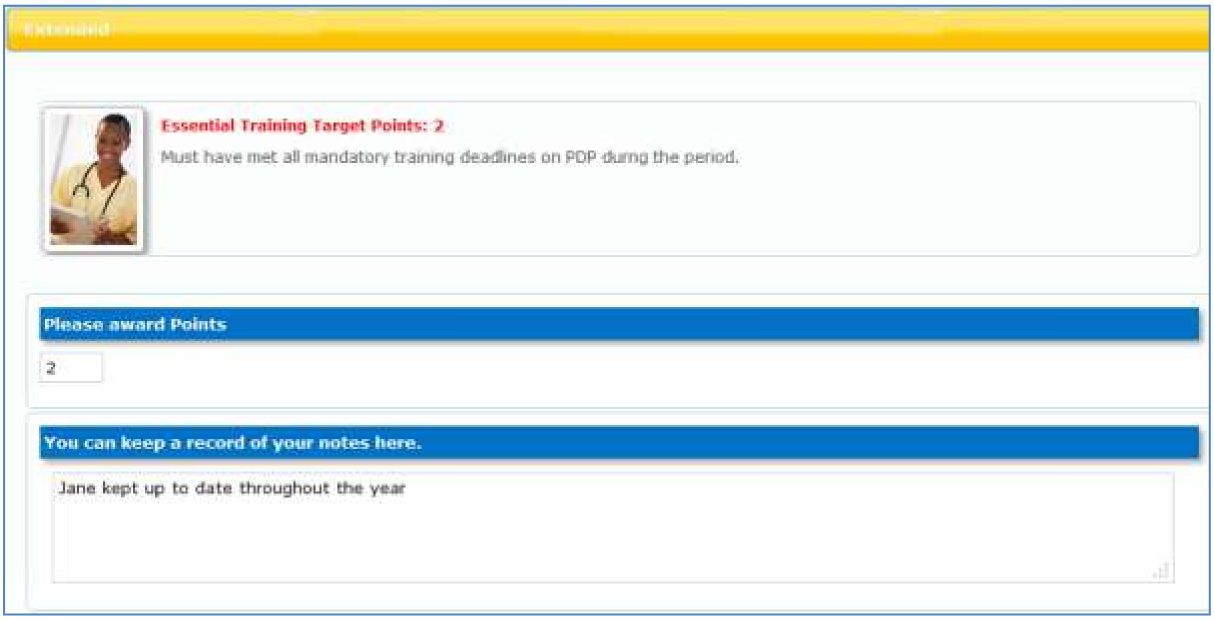
Behaviours: Working With Others Target Points: 4

To value and develop teamwork

No points awarded yet

More....
More....
More....
More....

By clicking on a benchmark the action screen pops-up:



Essential Training Target Points: 2

Must have met all mandatory training deadlines on PDP durng the period.

Please award Points

2

You can keep a record of your notes here.

Jane kept up to date throughout the year

Note that the task here is related to Behaviours so the Manager can click on the Tab at the top right and see the employee's Behaviours and ratings before awarding points. ***This will help the Manager to speed up the process by having quick access to reliable evidence.***

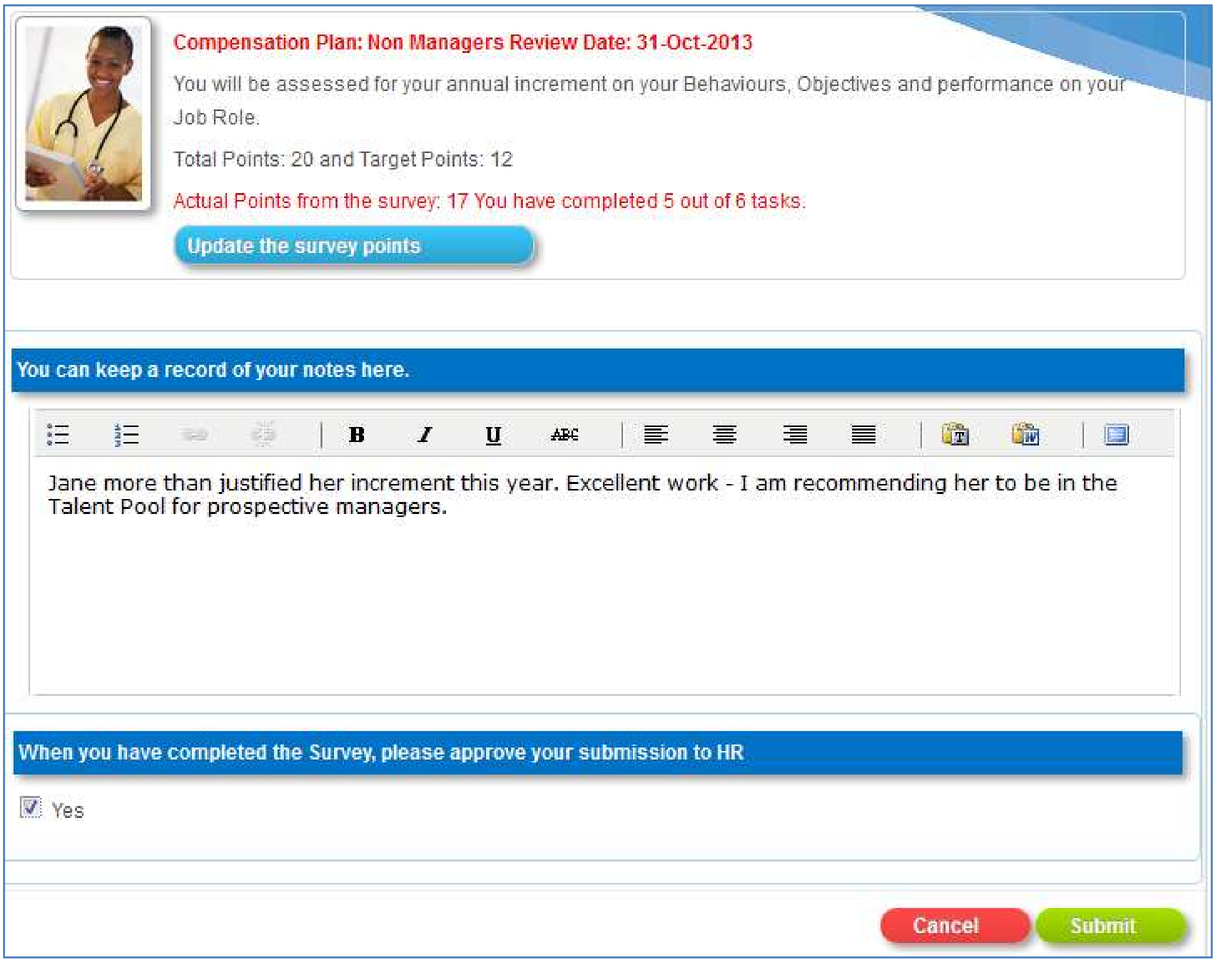
As noted during set-up in Step 1 above, depending on the task the Tab could have a link to:

- Behaviours
- Objectives
- PDP
- Skill Competencies
- Mandatory Training
- Job Role Competencies
- Direct Reports
- None of the above

Step 4

The Manager approves the completed Compensation Surveys

Finally, when all the tasks are complete, the Manager approves the points awarded and includes an overall observation:



Compensation Plan: Non Managers Review Date: 31-Oct-2013

You will be assessed for your annual increment on your Behaviours, Objectives and performance on your Job Role.

Total Points: 20 and Target Points: 12

Actual Points from the survey: 17 You have completed 5 out of 6 tasks.

You can keep a record of your notes here.

Jane more than justified her increment this year. Excellent work - I am recommending her to be in the Talent Pool for prospective managers.

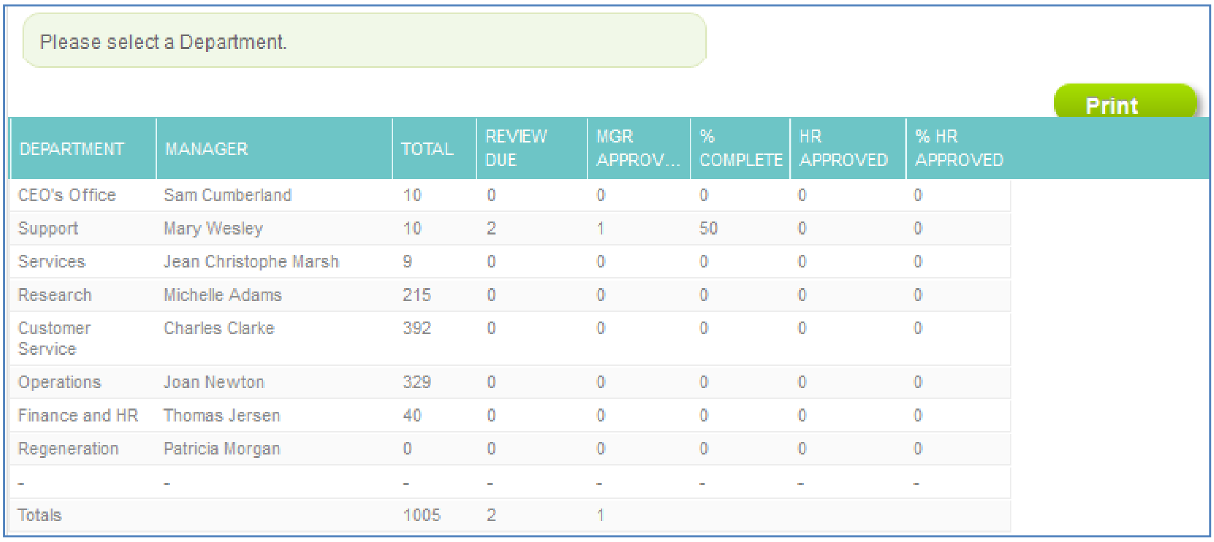
When you have completed the Survey, please approve your submission to HR

☑ Yes

Step 5

HR approves the completed Compensation Surveys

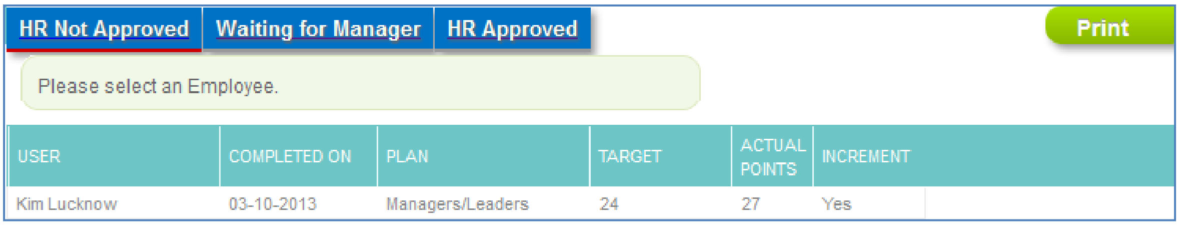
The statistics are displayed by Department:



Please select a Department.

DEPARTMENT	MANAGER	TOTAL	REVIEW DUE	MGR APPROV...	% COMPLETE	HR APPROVED	% HR APPROVED
CEO's Office	Sam Cumberland	10	0	0	0	0	0
Support	Mary Wesley	10	2	1	50	0	0
Services	Jean Christophe Marsh	9	0	0	0	0	0
Research	Michelle Adams	215	0	0	0	0	0
Customer Service	Charles Clarke	392	0	0	0	0	0
Operations	Joan Newton	329	0	0	0	0	0
Finance and HR	Thomas Jersen	40	0	0	0	0	0
Regeneration	Patricia Morgan	0	0	0	0	0	0
-	-	-	-	-	-	-	-
Totals		1005	2	1			

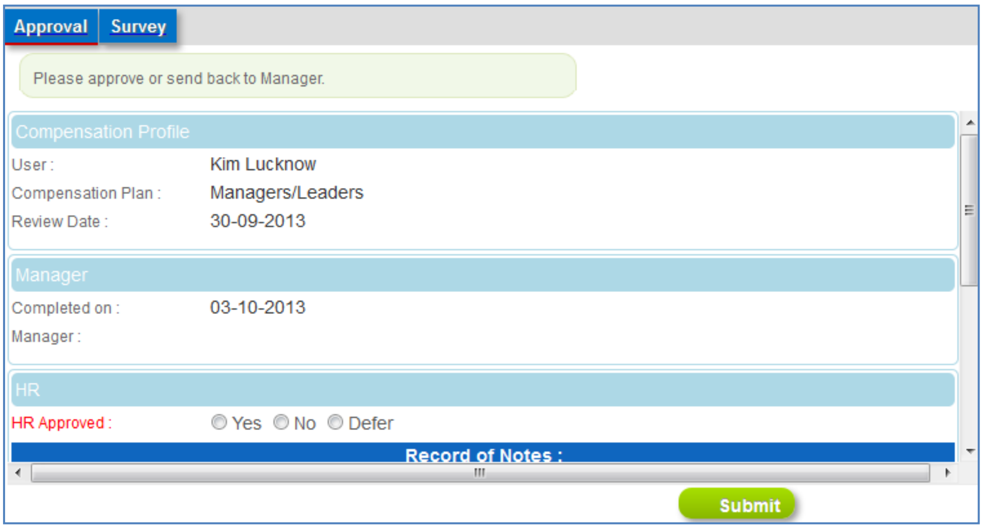
Within the selected Department the HR officer sees the surveys that have not yet been approved by HR with highlights of those below the threshold:



Please select an Employee.

USER	COMPLETED ON	PLAN	TARGET	ACTUAL POINTS	INCREMENT
Kim Lucknow	03-10-2013	Managers/Leaders	24	27	Yes

HR can approve the increment or not, or can refer the survey back to the Manager:



Please approve or send back to Manager.

Compensation Profile

User : Kim Lucknow
Compensation Plan : Managers/Leaders
Review Date : 30-09-2013

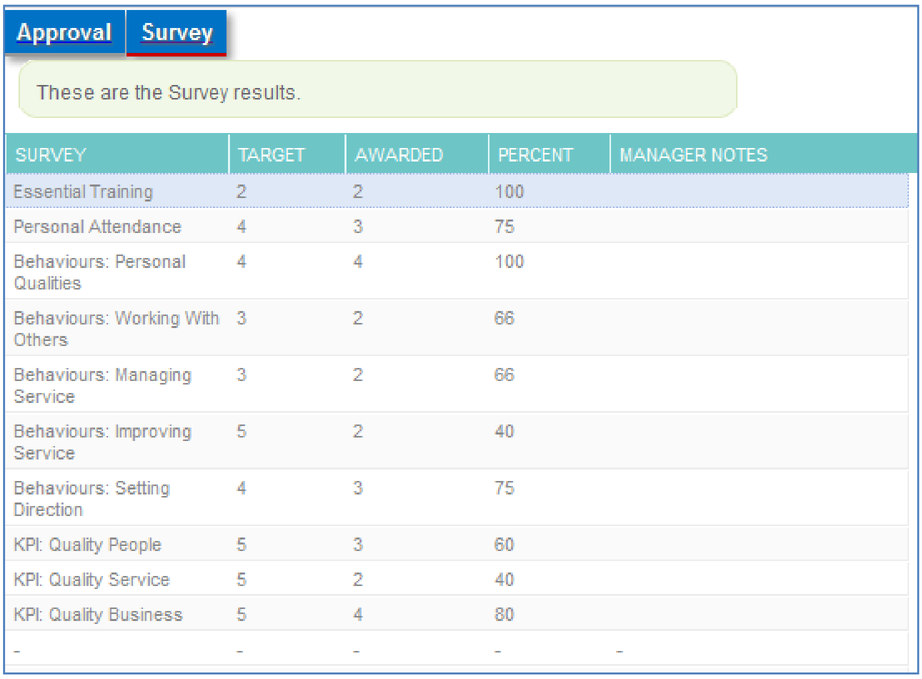
Manager

Completed on : 03-10-2013
Manager :

HR

HR Approved : ○ Yes ○ No ○ Defer

The HR officer can also see the detail of each benchmark and the Manager's notes:



These are the Survey results.

SURVEY	TARGET	AWARDED	PERCENT	MANAGER NOTES
Essential Training	2	2	100	
Personal Attendance	4	3	75	
Behaviours: Personal Qualities	4	4	100	
Behaviours: Working With Others	3	2	66	
Behaviours: Managing Service	3	2	66	
Behaviours: Improving Service	5	2	40	
Behaviours: Setting Direction	4	3	75	
KPI: Quality People	5	3	60	
KPI: Quality Service	5	2	40	
KPI: Quality Business	5	4	80	
-	-	-	-	-

Step 6

Update HR records

The review data can be extracted in a format to suit your HR application - ESR, Oracle, SAP etc. using standard protocols such as XML.