

Recruitment, Payroll & Contracts

Academies



Service Schedule 2019-20

Introduction from Service Lead

Dear Headteacher, Chair of Governors and School Business Manager,

I would like to take this opportunity to welcome you to the service schedule for our Recruitment, Payroll and Contracts team. We appreciate the opportunity to tender for the delivery of our services on behalf of your school. We look forward to having the opportunity to build a positive relationship with you over the coming year.

As a service, we are committed to working in collaboration with our customers, and to delivering packages which meet the requirements of our customers. We are able to offer a number of contracts, including: one year term, rolling contracts, and an incentivised two or three year contract offer.

Lorraine Edwards

HR Operations Manager

Description of our service

Our team exists to ensure that your Academy or Multi Academy Trust benefits from a dedicated team of professionals providing accurate advice and support on all aspects of our service. We ensure that your organisation adheres to statutory requirements, and we accurately manage information on your behalf.

Our aim is to support you in managing your employment and contractual requirements through a comprehensive service which:

- Provides an end to end Recruitment process
- Ensures payments are made on time and accurately
- Ensures payments are processed in accordance with statutory and contractual regulations (including IR35 and Apprenticeship Levy)
- Provides an efficient Contract Management service
- Provides a comprehensive Pensions Administration service
- Provides an outstanding and quality service, through commitment to excellence and continuous improvement.

Description of our service

What we will do for you:

Ref.	
P1.0	Statutory Services
P1.1	Pay employee's on their contractual monthly pay day.
P1.2	Make BACS payments directly into employee's bank account.
P1.3*	Issue fully itemised and confidential electronic payslips and P60's.
P1.4	Assess and pay statutory and occupational sick, maternity, paternity and adoption pay with statutory record keeping and issue forms in relation to statutory payments as prescribed by legislation (e.g. SSP1L).
P1.5	Deduct pension scheme contributions including added years, additional voluntary contributions and pay to the respective bodies within set deadlines (See Appendices A and B for detailed tasks in relation to pension schemes).
P1.6	Create additional pension schemes third party payees as required by the customer.
P1.7	Deduct Income Tax, National Insurance Contributions and Attachment of Earnings Orders made by various statutory bodies in accordance with legislation and regulations made under such statutes.
P1.8	Submit HMRC Real Time Information in a timely manner on a monthly basis and year-end documentation. In addition P11D's and produce P45's for employee's who leave employment.
P1.9	Apply nationally agreed pay awards and any associated arrears including ensuring that minimum wage and apprentice hourly rates (where selected) are increased in line with annual and age related increases.
P1.10*	Apply locally agreed pay awards allowing one pay increase per year.
P1.11	Manage electronic year end filing and reconcile year-end tax returns.
P1.12	Provide information, on request to various government agencies, including the HMRC and Child Support Agency.
P1.13	Maintain audit trails for inspection by internal, external and HMRC auditors.

P2.0	Transactional
P2.1*	Process permanent and temporary contractual changes and non-contractual variations received electronically, e.g. starters, leavers, changes, timesheets, overtime and mileage claims within set deadlines.
P2.2	Deduct, record and pay voluntary deductions. Make timely payments in relation to voluntary deductions such as union subscriptions and credit union.
P2.3*	Calculate emergency payments outside the monthly pay process.
P2.4	Recall incorrect BACS transmissions and communicate with the customer's bank where necessary.
P2.5	Process increments as per relevant conditions of service.
P2.6*	Calculate net overpayments.
P2.7	Support on auto enrolment, re-enrolment and associated administration (see Appendix C for detailed tasks in relation to auto enrolment).
P2.8*	Administer Salary Sacrifice Schemes.
P2.9*	Support and administer one restructure and up to 20 employees through TUPE transfers.
P2.10	Pay or recover outstanding leave.
P2.11	Calculate and pay travel allowances and expenses.
P2.12	Administer caretaker's lettings.
P2.13	Provide information for Long Service Awards for qualifying staff where applicable.
P2.14	Administer the Teachers Annual Service Return (see Appendix D). ⁱ
P2.15	Administer the advertising of vacancies (including Principal/Headships) in local and national media and on Shropshire Council's opportunities list.
P2.16	Ensure pre-employment checks for all new starters, re-joiners and any other applicable role changes are undertaken, in line with 'Keeping Children Safe in Education Guidance'. This excludes the certificate cost that the DBS charge (currently £44 for an enhanced check).
P2.17	Provide recruitment administrative support for new Principal/Head Teacher appointments.
P2.18	Produce and issue contracts of employment and written statements of particulars, contract changes and leavers paperwork including updating all relevant systems.
P2.19	Manage electronic employee personal files and redirect upon an employee's transfer from the organisation.
P2.20	Maintain accurate post information within the HR and Payroll system for Academy establishment lists.
2.21	Provide assistance with assessment of self-employed status.

P3.0	Management of Information
P3.1	Produce costing files and/or reports for uploading to customers' chosen finance system.
P3.2	Transfer automated information in relation to the relevant pension scheme(s) members including the Local Government Pension Scheme (LGPS) and Teachers' Pension Scheme (TPS) on a monthly and annual basis adhering to statutory obligations (see Appendices A and B for detailed tasks in relation to transfer of information to pension funds).
P3.3*	Provide agreed standard reports for third parties, BACS, expenditure, projected end dates, sickness absence, sickness triggers and establishment lists.
P3.4	Provide information to other third parties at the request and authorisation of the employee concerned adhering to the Data Protection Act 1998.
P3.5	Provide an annual timetable detailing pay dates and deadlines for agreement with customer.
P3.6	Assist with the collection of data under Freedom of Information (FOI) requests.
P4.0	Support Services
P4.1	Advise on procedures, conditions of service and new legislation.
P4.2	Provide access to a nominated advice line.
P4.3	Provide access to an online HR and payroll system 365 days a year, including submission and processing of mileage claims with online authorisation. This will be subject to occasional planned downtime for scheduled maintenance work and system improvements.
P4.4	Respond to all queries relating to employee's pay/payroll information in a timely manner.
P4.5	Provide access to a designated contact, knowledgeable in terms and conditions of employment and service needs.
P4.6*	Provide assistance and support with Devolved Input training and input of non-sickness absences.
P4.7*	Provide training on self-serve processes and support on general legislative and statutory changes.
P4.8	Archive records in a secure and safe environment.
P4.9	Provide a fully backed-up system off site.
P4.10	Commit to continuous improvement through the collation of customer feedback via annual surveys and analysis of findings.
P4.11	Provide access to payroll advice, information and FAQs through the Shropshire Learning Gateway.
P4.12	Offer membership of a customer user group.

What we require from you...

Ref.		Date required (if applicable)
C1	Ensure that sufficient sums are deposited into a nominated bank account at all times to allow payments to be made.	
C2	Ensure that employer's bank accounts have a BACS facility to enable payments to be made.	
C3	Provide information on new starters, leavers and changes to an employee's contract electronically via the online HR and payroll system in accordance with our deadlines and in the agreed format.	
C4	Provide payment amendments in accordance with our deadlines and in the agreed format for the relevant payroll cycle. In instances of deadlines being missed (late data); these will be processed in the next pay cycle, unless the customer requests an emergency payment.	

Key Performance Indicators (KPIs)

Ref	Description of KPI	Target	Tolerances
1.0 SERVICE DELIVERY TIME			
1.1	Queries answered at first point of contact (by telephone/email) closed within agreed timescales with customer	100%	R = < 85% A = 85% - <89% G = >= 90%

Days/times during which services are available

Monday - Friday	8.30am - 5.00pm
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Contact Details

For more information	
Contact name	Darren Edwards
Role	Business Partner for Development
Telephone	07888090972
Email	Lorraine.edwards@shropshire.gov.uk
Contact name	Abbie Fitch
Role	Lead Officer - Payroll, Control and Reconciliation
Telephone	01743 252190
Email	abbie.fitch@shropshire.gov.uk

Charging and Enquiries

For details on the various packages available for this service, including rolling contracts, 2, 3 and 5 years contracts and pay-as-you use options, or if you have any queries or issues regarding your service arrangements please contact us on the above contact details.

Additional Services

Additional services will be billed at point of delivery. The following services will be available on request:

Ref.	Service	Cost per hour (unless otherwise stated)
A1.0	Statutory Services	
A1.1	Fully itemised paper payslips and P60's (electronic payslips and P60's included as part of core service) (Ref P1.3)	Fee to be negotiated
A1.2	Additional Pay Increases (Ref P1.10)	Fee to be negotiated
A1.3	Compile data and complete the annual s Workforce Census.	Fee to be negotiated
A2.0	Transactional Services	
A2.1	Process permanent and temporary contractual changes and non-contractual variations received in paper format, e.g. starters, leavers, changes, timesheets, overtime and mileage claims (Variations received electronically are included as part of core service) (Ref P2.1)	Fee to be negotiated
A2.2	Emergency payments outside the monthly pay process (Ref. P2.3)	£35 per payment
A2.3	Calculation of net overpayment (Ref. P2.6)	£35 per overpayment
A2.4	Salary Sacrifice Schemes (Ref P2.8)	Fee to be negotiated
A2.5	Restructures and TUPE transfers (above the agreed Schedule number) (Ref P2.9)	Fee to be negotiated
A2.6	Redundancy Calculations	£70 per calculation
A2.7	Provide an end to end e-recruitment management system, enabling the ability to process, track and report on recruitment campaigns	£3000 (plus £1000 if not purchasing standard schedule)
A3.0	Management of Information	
A3.1	Ad hoc Reports (Ref. P3.3)	Fee to be negotiated
A4.0	Support Services	
A4.1	Onsite process and system training (Ref. P4.6 & P4.7)	£50 per half day, (excludes travel costs)

Appendix A - Teachers Pension deductions and payments (P1.5/P3.2)

Tasks undertaken in relation to the transfer of information to pension schemes (Teachers' Pension)

Type	When completed	Frequency of completion
Paying over of employee and employer contributions	By 7 th of the month following the pay period end date i.e. July payment due on 7 th August.	Every month
Reconciliation of payments	The reconciliation into bandings of the payments made to Teacher's pensions. Due by 7 th of the month following the pay period end date.	Every month
End of Year Certificate	Support in the completion of the end of year certificate to allow this to be audited.	Annually

Appendix B – Local Government Pension Scheme deductions and payments (P1.5/P3.2)

Tasks undertaken in relation to the transfer of information to pension schemes (Local Government Pension Scheme)

Type	When completed	Frequency of completion
Starter Details	All relevant detail of new starters passed to Pensions team.	Monthly
Leaver Details	All relevant detail of leavers passed to the Pensions team.	Monthly
Changes details	All relevant changes to employee details passed to the Pensions team.	Monthly
Production of: Pen07 – LGPS Leaver Form Pen010 – Request for an estimate of retirement benefits for a Pensionable Employee Pen011 – Request for Pay Information	When required	Upon request
Year End reconciliation	Balancing and reconciliation of payments made to pension fund.	Annually
FRS17	Pensionable pay and contributions for Actuarial valuation.	Annually
Employee contribution Interfaces	Production of information to LGPS scheme for member contributions.	Annually

Appendix C– Auto Enrolment (P2.7)

Additional services currently provided within auto enrolment:
Support customers in their decision making;
Provide advice based on knowledge and experience;
Provide sample letters for customers to review/amend and use (if required);
Provide reports to confirm which category each employee is in, report includes personal details/addresses etc. that may be used as a mail merge;
Provide guidance on auto enrolment rules;
Opt all employees who become eligible into relevant scheme;
Administer all opt outs from employee's;
Record history of all changes in categories and categorisation at staging date for all current and new employee's;
Determine any changes in category for employee's and inform employer that a change in category has occurred whilst maintaining correct information in system;
Support re-enrolment processes at employers 3 year anniversary date.

Appendix D - Teachers Pension (P2.14/P6.2)

Tasks undertaken in relation to the transfer of information to pension schemes (Teachers' Pension)

Type	When completed	Frequency of completion
Pension form TR6	When an employee starts	As and when employees start
Pension form TR8	When an employee leaves	As and when employee leaves
Pension form TR28	When missing service is identified on an employee's teachers' pension record	As and when identified
Other Pension forms	As and when other forms are received from TP requesting various information in relation to starters, leavers and scheme members	As and when received
Teachers Annual Return	Completion of the Teachers Annual (Salary) return according to the deadline stated by the Teachers Pensions	Annually