

HBOS PAY - THE STORY SO FAR

Unite the Union are continuing negotiations with HBOS on Pay 2008. Members will be aware that pay talks are usually concluded before Christmas however to ensure the best deal possible for you, discussions are ongoing. To date a series of meetings have taken place but as yet we have had no comprehensive offer to take to members. When negotiations are concluded, Unite is committed to consulting members on the offer. We will keep you informed of ongoing progress. In the meantime, check our website <http://www.amicustheunion.org/Default.aspx?page=2321> regularly for updates.

What happens Next?

Following the ending of negotiations on the total amount of money available for pay rises this year (known as the pay pot), discussions will then ensue on its distribution. It is important that HBOS colleagues and members know and understand the pay decisioning process in order that they are satisfied with their performance rating which ultimately decides their pay increase. All colleagues in Levels 1 and 2 (currently with the exception of Corporate) will have a pay matrix that determines their pay award as a direct and transparent result of their appraisal and how close each individual is to the 'salary guide figure' for their job grade. Retail and I&I's appraisal system is known as the CLEAR process whereas Corporate and Group Functions and Services is normally known as Performance Management process. However both systems are directly linked to pay awards.

For those HBOS colleagues and members in Levels 3 and above, your pay award is discretionary, meaning that line managers decide upon an individual's pay rise dependent upon your appraisal outcome. HBOS is committed to fair and equitable pay distribution by taking account of your annual performance, where you are within the pay band and how you compare to your peers.

Equal Pay - members will be aware that HBOS has committed to tri-annual joint equal pay audits with the unions. The audits follow the guidelines drawn up by the Equality and Human Rights Commission (formerly known as the Equal Opportunities Commission). The next audit is due to take place after the pay implementation in May 2008 and Unite will be discussing with the Company a proper framework on how the audit should take place.

Appraisals and Pay Decisioning

It is that time of year again when all colleagues in HBOS are given their final appraisal rating on the basis of what and how they have done against the objectives set at the beginning of the year. Unite has many reservations regarding performance related pay but acknowledges the Company's efforts in introducing a pay matrix for many colleagues to ensure that the system is as transparent and robust as possible.

We want to make sure our members get the best from their performance appraisal system and that your rating accurately reflects how and what you have achieved under the circumstances you have worked. It is vitally important that you are satisfied that your rating reflects your performance over the past year as it has a clear and defined link to your annual pay award.

This guide takes you through the agreed process for the end of year appraisal which should be adhered to by all line managers and colleagues. Unite will support members in challenging unacceptable behaviours and ratings. All calls and communications received by Unite will be kept confidential between you and the Union Seconded Representative or Workplace Rep.

How the Appraisal Process Works

1:2:1 with line manager

All colleagues must have a 1:2:1 with their line manager. This should be face to face with no distractions so that the colleague and their line manager can fully focus on objectives set at the beginning of the year and how much has been achieved. Members should also highlight any challenges facing them in achieving their objectives that they feel should be considered when pay decisioning is being made. The colleague's value in all aspects of their role should be considered.

Appraisal Rating

At the end of the discussion, your line manager should tell you your rating and set your objectives for the coming year so you are clear about what is expected from you. There should be no surprises as your ½ yearly appraisals and ongoing discussions with your line manager should have put you in the picture. If you are in agreement with the rating, then the process is concluded. If you disagree with the rating, you should ask your line manager to note this and follow the issue resolution process set out below. You can also contact the Union for advice.

It's Up to You Too - A Joint Process

Line managers receive training in conducting performance appraisals and it is up to you to ensure that the agreed process is followed. Unite members need to ensure that they have had regular updates and an end of year appraisal. Ensure that all factors are discussed during your appraisal meeting such as additional responsibilities, staff shortages and any other relevant factors. Ask for a note to be made of these factors during your appraisal meeting.

Your performance rating should be agreed and understood prior to the conclusion of the meeting so there is no doubt about your rating. **IT IS NOT ACCEPTABLE THAT YOU ARE GIVEN A RATING WITHOUT HAVING A MEETING WITH YOUR LINE MANAGER FIRST.**

Unhappy with your Rating? Next Steps

If you are unhappy with the rating and it is subsequently imposed, then you should take the following steps:

- Review objectives/targets and supporting documentation which clearly defines evaluation rating expectations for your role.
- Reflect on the regular conversations with your manager throughout the year, documentation and other KPI evidence to ensure your progress and achievements have been recognised.
- Talk to your line manager and explain how your performance evidence supports your challenge. Ask your line manager to explain their evaluation of your performance, the evidence behind it and what account they have taken of any circumstances which got in the way of you achieving your objectives.
- If your concerns are still not resolved, then you should submit a letter in writing to your line manager and request a further meeting. Your manager should respond within a reasonable timeframe.
- If the matter is still not resolved then contact your Union representative for support and further advice.

HBOS is committed to treating all colleagues with fairness and respect and decisions are made in a reasonable and consistent manner. This includes your ½ yearly and annual appraisal. If you are uncomfortable or concerned with any aspects of the appraisal process, then call your Unite Seconded Rep for support and advice or email the HBOS helpline as detailed below.

Equal Treatment

It is important that HBOS treats all colleagues equally in assessing their performance appraisal and that line managers fulfil expectations in exercising objectivity when assessing colleagues. If you feel you have been unfairly treated or that the manager has not followed due process, then contact the Union's Seconded rep for support and advice.

Who To Contact

Contact your seconded rep in the first instance on the following numbers:

Colin Percy
Unite Office
HBOS plc
3rd Floor
110 Queen Street
Glasgow G1 3BY

Tel: 0141 308 7844

Email:
ColinPercy@halifax.co.uk

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Alternatively you can email the Union's email support on amicussupport.hbos@amicustheunion.org



Join online at www.amicustheunion.org or call the recruitment hotline free on 0800 587 1222.