REWARD STRATEGY

INCORPORATING PAYROLL WORLD

Issue 220

THE M WORD

How HR and reward professionals are breaking the menopause taboo

Issue 220
February 2020

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1st Floor, Axe & Bottle Court,
70 Newcomen Street, London SE1 1YT

Printed by: Stephens & George
ISSN No: 1474-9068

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Membership starts from £165

MEASURE WELLBEING IN 2020

Amber-Ainsley Pritchard

> "I didn't think my lifestyle would affect my biological age too much. I was wrong"

Welcome to 2020. Sounds strange doesn't it? But we have indeed entered a new decade.

Last year we saw the theme of wellbeing in the workplace build speed and it seems this is to continue, which can only be good for society - especially given the research that a happy workforce is a more productive workforce.

Hoping to help keep your workforce happy and healthy is Chronomics, a platform that analyses epigenetics to drive personalised and preventative healthcare. Epigenetics is the study of how lifestyle and environment factors can modify DNA.

Chronomics is calling upon employers to test their employees' wellbeing by using one of their kits - which will help to inform them what they need to do to be healthier for both their body and mind.

I took one of these tests in December - a simple and attractive 'spit in a tube' sort of test - and recently took a call with Dr Daniel E. Martin-Herranz, chief science officer at the platform, to find out my results.

I don't drink much alcohol or smoke, but I'm also not the fittest person on the planet and indeed suffer from anxiety and the ability to become easily stressed. Yet, I didn't think this would affect my biological age too much. I was wrong. My current lifestyle portrays my age to be three years older than I am (my real age will remain a secret).

The importance of these tests is that it highlights issues you may not even think about affecting you internally. This is why Chronomics want to highlight, to employers, the ways in which they can improve their employees' wellbeing - and do so through a measurable tool, so employees can make changes and track the effects each year.

If you have the power to implement something which could improve employee wellbeing, will you? What do you have in place to support your team in 2020? Let me know at apritchard@shardfinancialmedia.com

CONTENTS

REWARD

10 **ACHIEVE ADVOCACY THROUGH REWARD**
Megan O'Shaughnessy explains how reward can be used as a lever to create brand ambassadors

PAYROLL

26 **WHAT WE LEARNED AT THE AUTUMN UPDATE**
Reward Strategy highlights the key takeaways from the 15th annual Autumn Update in 2019

28 **HOW 'JACK'S LAW' WILL WORK**
Helen Hargreaves guides payroll managers through the impending parental bereavement legislation

30 **COULD THIS BE THE DECADE FOR PAYROLL?**
Ian Hodson predicts future trends of the workplace and how they could affect payroll

32 **IR35: WHERE ARE WE NOW?**
The latest review of IR35 is due to conclude soon, but Caroline Harwood says you shouldn't wait to prepare

HR

33 **GET BETTER AT TALKING ABOUT PAY**
Charles Cotton explains how to start improving your communication around fair pay

WORKPLACE PENSIONS

34 **EASE THIS PENSIONS GROWING PAIN**
Kay Ingram explains how the pensions tax relief tapered annual allowance is affecting high earners

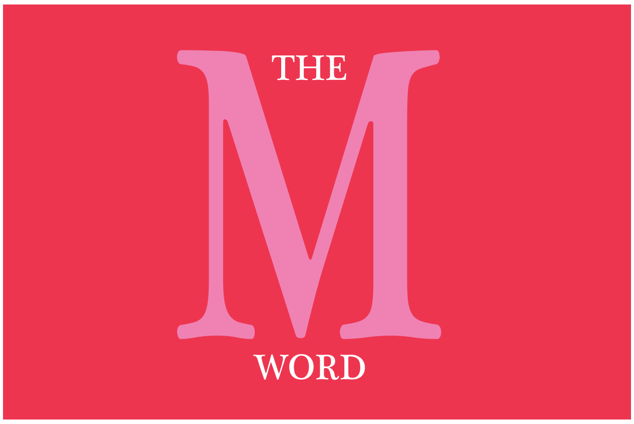
37 **HOW TPR CAN HELP YOU**
Director of supervision at The Pensions Regulator explains how the watchdog works with at-risk schemes

EMPLOYMENT LAW

38 **CHANGES YOU NEED TO KNOW**
Madeleine Mould recaps the raft of changes employers need to prepare for ahead of April 6

DATES FOR YOUR DIARY

41 **EVENTS CALENDAR**
Keep track of all *Reward Strategy's* events



06 How HR and reward professionals are breaking the menopause taboo

12 Amiel Barrimond, of Travelex, on the simplicity of the function, removing bonuses and why "your word" is essential

18 **"EAT, SLEEP, REWARD, REPEAT"**
The winners of The Rewards 2019 are revealed

Crowe

REWARD STRATEGY
INCORPORATING PAYROLL WORLD

IR35 Talks

Breakfast seminar

Reward Strategy and **Crowe UK** are hosting a breakfast seminar which will look at how you can prepare for the changes to IR35 which are due to be implemented in April 2020. Join us to find out what the changes mean for you, how to identify key stakeholders and off-payroll workers and how to plan for change.

Who should attend
The seminar will be of value to all medium and large organisations which engage off-payroll workers. The attendees may be from HR, Reward and Payroll functions.

Please contact **jthomas@shardfinancialmedia.com** if you would like to attend or have any questions.

Date
Wednesday 26 February 2020

Time

08:30	Registration
09:00	Seminar starts
10:00	Q&A session followed by networking

Venue
Crowe UK
St Bride's House
10 Salisbury Square
London EC4Y 8EH

www.crowe.co.uk

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THE M WORD

The fastest growing proportion of the UK workforce is having to deal with a disruptive life event that no one is talking about, so how can workplaces break the taboo that is the menopause?

Women over the age of 50 are the fastest growing portion of the UK workforce, and most of these will go through the menopause during their working lives, according to the Chartered Institute of Personnel and Development (CIPD). Yet, the topic within most workforces remains a taboo.

As a result, one-third of women choose not to disclose their symptoms at work, with CIPD research suggesting this is largely due to unsupportive management.

In 2019, the CIPD surveyed working women between the ages of 44 and 55. It found that 59 percent of those experiencing menopausal symptoms said it had a negative impact on their work. Therefore, the institute has called upon the government and employers to build menopause-friendly workplaces, whether that be through implementing a policy, guidance or framework.

Reward Strategy interviewed HR and reward professionals to find out how many workplaces already have menopause policies and how such frameworks could improve diversity.

Break the taboo

Reward Strategy asked professionals why they thought the menopause was still seen as a taboo subject and how it could be broken.

Tim Robertson, UK compensation and benefits lead at Microsoft, said the menopause is becoming less of a taboo subject, but it has been given a negative portrayal in the past.

Lewis Rooke, reward manager at Bibby Financial Services, said because it's a very personal subject, some women may feel uncomfortable talking about it with colleagues.

Robertson added: "It is certainly a topic that men do not feel comfortable discussing. At companies where diversity is poor, with many white men in management, it's likely that women would have felt uncomfortable discussing this.

"Bypassing management and communicating directly to employees, with policies that don't require having these discussions with managers, are crucial in breaking down this taboo. A higher number of females in more senior roles will also help this."

Agreeing with Robertson, Marion McNally, head of inclusion at Sainsbury's Supermarkets, said: "At Sainsbury's we know we have around 34,000 women of menopausal age, so it's important that we don't just talk to women about it, as most men will have a family member, partner or colleague that will go through the menopause too."

Elizabeth Strong, HR operations manager at the Kerry Group, added: "Any condition that has personal, hormonal or gynaecological symptoms - or causes - brings with it the 'embarrassment factor' in many UK industries. However, just a few key, influential people having the courage to break that taboo and speak openly can make a huge difference."

The co-chairs of Channel 4's staff network 4Women, Jane English, Landy Slattery and Navene Alim, said: "The taboo around menopause stems from a lack of conversation and awareness in broader society, and a view that menopause is 'just a women's issue'.

"Ageism also plays a large part in women not wanting to discuss that they are having symptoms when it comes to the workplace.

"The stigma will be disrupted when we educate staff about the symptoms (it's more than 'just' hot flushes) and put official support in place to support women experiencing it and those around them, including their line managers."

Megan O'Shaughnessy, head of reward – consumer at BT Centre, agreed, but said it will be a while before menopause policies become standard practice.

However, Nicola Junkin, staff health and wellbeing lead at the University of Leicester, said the university has tried very hard to break the taboo around the menopause and launched a workplace policy in 2017.

She said: "We challenge our staff to use the word menopause at least three times a day to help break the taboo and have made it clear that this is not just a woman's issue, as whole families can be affected."

Should menopause policies exist?

Symptoms of the menopause can be disruptive, with women often experiencing hot flushes, sleep disturbances, night sweats and psychological issues, such as mood swings, anxiety and memory loss.

CIPD research also found that these symptoms have led to 30 percent of women taking time off work - with only a quarter feeling able to tell their manager the real reason for their absence.

With the menopause very much still a workplace taboo, *Reward Strategy* asked HR and reward professionals if they agree that the menopause is an important issue which needs tackling.

Robertson definitely believes companies should provide information and support for employees: "It's important because it's a very big attraction and retention issue for women aged 50-64 in the workplace - this figure is around 4.4 million according to a 2019 ONS survey. There's a strong compliance argument around this too, under the Duty of Care section of the Equality Act."

Strong added: "Nowadays, it is practically unheard of for a workplace not to have a policy for all key life-changing events: maternity, adoption, retirement etc. so this should be no different.

"For a huge section of society, it is an unavoidable stage of life. If you think about it, the menopause would in fact impact on a far higher number of the working public than, say, maternity. Not every woman chooses to experience a pregnancy or become a parent, but that doesn't stop them going through the menopause."

O'Shaughnessy also held this opinion: "If we don't include policies for the menopause like we do for when someone has a child, we are creating an undercurrent of a non-inclusive workforce."

Strong continued: "Some argue that

there is no requirement for many other health-related conditions that affect millions of people, but the reality is that until we are in a place where the menopause can be discussed as openly as more widespread common illnesses and conditions, a policy would provide the security of a standardised approach and framework for employers and employees to navigate."

Considering the effects the menopause can have on mental wellbeing, Rooke said organisations should definitely have workplace policies and they should be considered it in the same vein that general physical and mental health is.

Do you have a policy?

According to the CIPD, less than 10 percent of organisations have any form of policy, framework or guidance to support women through the menopause, so what are professionals doing to help women experiencing this life event?

Rooke said Bibby Financial Services does not yet have a menopause policy, but it is something they would like to address in the near future.

Strong said the Kerry Group does not yet have a policy either, but cases of individuals coming forward and opening up about their symptoms and their need for support are on the rise.

She added: "Currently, the level of understanding and support offered is very much dependant on the skills and experience of the line manager or HR colleague that is approached, which is of concern."

The Kerry Group is, however, offering support through its existing employee assistance programmes, flexible working, adjustments to workplace environments and with time off for medical and alternative therapy appointments.

Also without a formal policy is Sainsbury's Supermarkets, Marks & Spencer and BT Centre, but they have equipped line managers to have conversations around the menopause through guidance and training.

> "The taboo stems from a view the menopause is 'just a women's issue'"

Marks & Spencer has also developed a menopause colleague network and BT Centre has a dedicated page on its HR site with guidance on symptoms, treatments and how to get support while at work.

It appears that most employers do not have a policy in place, but have informal guidance available. This theme continues with O2. Last year, its employee women's network made menopause awareness a priority by developing two toolkits including guides tailored for both managers and employees. These were launched by Ann Pickering, chief HR officer and chief of staff, at Telefónica O2.

The network has also appointed menopause champions who volunteer as a source of support for employees who want to reach out and talk about the changes they – or someone on their team - are going through.

Pickering said: "Businesses like ours will only thrive if they reflect the society they are a part of, so ensuring women of all ages and life stages feel supported is the right thing to do."

Similar to O2, Microsoft has firm guidance in place. Robertson said: "We run various presentations and seminars throughout the year with experts highlighting the symptoms of the menopause and how to manage them in the workplace.

"We also have an employee support group, Women@Microsoft, where employees openly share their own experiences and challenges in the workplace and offer tips and best practices for managing symptoms."

Reward Strategy also heard from the University of Leicester, which was the first UK university to introduce a menopause policy.

Cathy Howells, occupational health manager at the university, said: "The policy was implemented across the organisation, in 2017, with a series of roadshows to give staff the opportunity to ask any questions about the policy and discuss menopause and its effects openly. We also ran workshops for managers to enable them to effectively operationalise the policy."

Junkin added: "The university continues to raise the profile of menopause by running regular menopause cafés, hosting events such as the comedy show *Her and the Change in Me*, providing useful menopause leaflets and keeping our menopause intranet webpages up to date. We ensure that new initiatives, research and findings are shared, which includes a helpful video to simply explain the menopause and its effects."

More recently, in October 2019, Channel 4 launched a menopause policy. The television network told *Reward Strategy* that the co-chairs of its in-house gender equality staff network, 4Women, were the driving force behind the new policy. The network chairs, English, Slattery and Alim, said they felt compelled to implement a policy after discovering colleagues were suffering in silence from debilitating symptoms of the menopause.

As part of the policy, women have access to flexible working arrangements; paid leave if feeling unwell due to menopause symptoms, including the sudden onset of symptoms whilst at work; a private, cool and quiet space; and a working environment assessment to ensure that their physical workspace is not making their symptoms worse.

The latest workplace to share the news it will implement a menopause policy is Derry City and Strabane Council. This January, the council told *Reward Strategy*: "The beauty of the policy is, while it is titled menopause, the format can be used with any health concern that a manager/colleague may be approached with.

"The underlying message is that we want to create an open and honest environment whereby staff feel comfortable talking about their health concerns and feel they get supported."

Dr Louise Newson, known as 'The Menopause Doctor', said: "The menopause can have a very detrimental effect on women in the workplace. Research we recently undertook showed that over 90 percent of women felt that their menopausal or perimenopausal symptoms were having a negative effect on their ability at work.

"Many women are leaving work due to their menopause and this needs to be addressed and acknowledged by employers."

Boardroom diversity

The average age that women experience the menopause is 51 - an age at which women are, often, more established in their careers. Without the right support, these women could feel uncomfortable at work and - as Newson mentioned - may even consider leaving their jobs altogether if their symptoms are severe.

Reward Strategy asked HR and reward professionals if menopause policies in the workplace could improve boardroom diversity, by keeping women in senior roles for longer.

The co-chairs of 4Women agreed that the age in which women experience the menopause, is an age at which many are at a more senior level. They said by giving menopausal women the support they need and lifting the stigma around the menopause, it would "absolutely" improve workplace diversity.

> "We challenge staff to use the word menopause at least three times a day"

O'Shaughnessy agreed that menopause policies would "without a doubt" help to improve boardroom diversity.

Although Robertson believes such policies could help, he said they must be supported by an inclusive culture or environment.

He added: "I would personally urge some caution about companies simply increasing their leave-related policies, particularly where they apply to females only. If you look at the extremes; Sweden and other Nordic countries have very generous parental and other family-related leave policies, and they have generally strong diversity. At the other end, they also have relatively high female unemployment levels.

"The US does not have especially generous leave policies, versus other Western nations, and has pretty good diversity figures - certainly compared to the UK. I do not believe simply providing more leave for females will aid diversity, it has to be as part of a family-friendly, supportive environment and culture that promotes wellbeing and support and encourages discussion on taboo topics."

In a similar respect, Strong said she wasn't convinced menopause policies alone would help to improve boardroom diversity as the issue goes much deeper.

She added: "I think the quality of policies and working practises of an organisation are, usually, indicative of the culture as a whole and culture is a much harder issue to tackle than just introducing mandatory policies."

Rachel Suff, senior employment relations adviser at the CIPD, said: "Women in the age group most likely to experience menopause are the fastest growing section of the labour market. They are often at the peak of their skills and experience and it doesn't make sense for employers to lose that talent.

"By providing appropriate support and a bit of flexibility where needed, employees can find it much easier to manage the impact of their symptoms at work. This puts them in a much better position to fulfil their potential at work and succeed in their careers - and in the boardroom."

The temperature

As calls to better support women in the workplace experiencing the menopause heat up, it seems that more employers are meeting these needs. They may not be implementing formal policies just yet, but they are taking a step in the right direction by introducing informative events, women's networks and guidance for managers.

Suff said each employer should decide the best way of developing an effective framework, but the key issues are to educate everyone about the menopause, communicate the organisation's support pathways and train line managers in how to have compassionate and supportive conversations with team members.

Employers also need to remember that health and safety - and equality - laws mean they are legally bound to support women going through the menopause. ■

Amber-Ainsley Pritchard, editor, Reward Strategy

Find the CIPD's menopause guidance online at: cipd.co.uk/knowledge/culture/well-being/menopause

REWARD

FEAUTURE

ACHIEVE ADVOCACY THROUGH REWARD

Megan O'Shaughnessy explains how reward can be used as a lever to create brand ambassadors

Megan O'Shaughnessy
BT Centre

> "Word of mouth is one of the biggest contributors to how a brand is perceived"

Reward is to give someone something in recognition of their services, efforts or achievements, but - as reward professionals - we know the word "reward" can conjure up a range of emotions and thoughts quite different to this definition.

Steadily over the last 10 to 15 years, reward has been a term that we see as consumers everyday - from loyalty coffee cards to added discounts when we sign up to insurance products. Rewards are everywhere and are, now, easier to obtain than ever.

So how are we able to strike the perfect blend of reward for employees, to encourage truly great work and create a sense of pride in working for our businesses?

What we can't do

We can't underestimate our employees' knowledge of reward, it's all too easy to think we know what employees want as rewards and to overcompensate.

Many companies will offer extensive benefits packages which are not always understood, valued or even used. Just because we can, doesn't mean we should.

Most of the time you will find that it's the small things that count. It is these small things that will lead your employees to have conversations with their friends about work, which will - in turn - make their friends want to work for you. This is advocacy.

During my time at Charlotte Tilbury, we created a fantastic culture of pride in working for the business - which wasn't always easy. As a business that was fast-paced and growing you had to be truly resilient to 'create the magic'. However, we had it slightly easier than most in the way that we had a tangible product we could gift our employees: the make-up. They could then use the products or gift them and most importantly - speak about them. This was the easy bit, but true advocacy must be genuine and by giving away products we weren't covering all bases.

"Ask yourself: Why should that person work hard for you?"

The S words

When you think about employee engagement, I believe you can break it down into three S words:

- What employees SAY;
- Why employees STAY;
- How you enable employees to STRIVE.

If we look at this from an advocacy perspective, you must be clear on what your ambition is - because word of mouth is one of the biggest contributors to your brand and how it's perceived.

At Charlotte Tilbury we were very clear that we wanted to be honest about what it was like to work at the company. This was hard, but it meant we were all 'in it together' and working towards a common goal.

Ambitions across the business were shared in a transparent way with a very upfront approach which our employees could relate to and more importantly, buy into.

We were honest when we made mistakes and celebrated our big wins, which naturally led to a sense of ownership - no matter what job role someone had.

When it came to our annual review for pay and bonus nothing came as a surprise, business updates had been shared, as had stretch targets, so employees knew exactly what they had to do to achieve. This was how we truly motivated people, by changing the perception of reward from being an annual cycle process to a process which reviewed true brilliance and rewarded in cash accordingly.

Not all companies will have unlimited cash pots, but rewards such as days out, vouchers, an extra day's leave or finishing early on a Friday in summer, can work in the same way and can create a sense of value that will get people talking about the business - not just while they work there, but once they have moved on.

Social media

Recently, there have been an increasing number of alumni groups popping up across social media. So it's important to remember that if you can't offer an employee progression at one point and they leave - it doesn't mean they won't return later when there is an opportunity that's right.

If you have done a good job during the employee's tenure, the decision to return will be a much easier one.

In 2020 it's unrealistic to think that employees will be with you for life, so the key challenge is to work together to get the most out of each other whilst they are with you. Ask yourself: Why should that person work hard for you?

In order to truly create advocacy and pride within your organisation, using reward, here are some key things to consider:

- Ask your employees opinion. Don't assume you know what they want;
- Remember, it doesn't always take big cash bonuses to make an employee proud to work for you;
- Don't forget your alumni, their word of mouth is more powerful than you know. ■

Megan O'Shaughnessy, head of reward - consumer, BT Centre

REWARD: "IT'S NOT CUT OUT FOR EVERYONE"

Amiel Barrimond, global head of reward at Travelex, on the simplicity of the function, removing bonus schemes and why "your word" is essential

> "Challenge when necessary, but don't just challenge to be a disrupter"

The phrase "cool, calm and collected" comes to mind when meeting Amiel Barrimond, global head of reward at Travelex.

It's possible many would describe him this way, maybe even himself when he explains his key to success is to "stay cool and manage well".

Barrimond believes the reward role is structurally simple, but says the profession is not for everyone given its ability to know the bare truth of a company's culture.

In an interview with Amber-Ainsley Pritchard, at a co-working space in London's iconic skyscraper The Shard, the global reward manager explains why he believes bonuses should be removed, the hindrance of finding clean data and what keeps him up at night.

ALP: You've studied and always worked in financial services, so how did you find yourself in the reward profession?
AB: "I initially wanted to do accounting or investment banking, but I ended up studying mathematics when I realised I did not like accounting. Then, during my masters degree, I was officially going down the route of investment banking and had an opportunity to spend a day with an investment banker - it turned me off the role completely.

"After my masters I decided to go into sales analysis, as I have an analytical brain, but then I saw a job for a reward analyst - I didn't have a clue what it was, but I went for it. I fell into reward.

"You don't grow up thinking, oh I'll get into HR and deal with compensation and remuneration - because most people don't even think about that as part of HR."

ALP: You have excelled in the three years you've been at Travelex; what would you say is your key to success?
AB: "The straight answer is: stay cool and manage well. I pride myself in being reliable and supportive. Challenge when necessary, but don't just challenge to be a disrupter - that was one thing I implemented quickly in my work ethic at Travelex.

"I realise the culture and it's about supporting people, but also being reliable. I would tell anyone, and I tell my team all the time, if you say you are going to do something, do it. It's as simple as that: if someone requests something of you and you can do it - deliver. Essentially, your word is your bond - that's one thing that's kept me going, as well as likability - but that's not to say you have to be best friends with everyone in the office. Mutual respect.

"The other thing I would say is luck. I think luck plays a huge part in my moving up quickly here. Shy boys don't get sweeties. Sometimes if you don't ask, you just don't get."

ALP: What does your new role entail?
AB: "I'm responsible for the full reward piece at Travelex, globally. My team is made up of myself and two business partners - one for the Middle East, APAC and India and one for North America, UK Europe and Africa.

"I oversee everything from your basics: annual compensation reviews, benchmarking, benefits, offering all the essential services all the way to the actual strategy of what the company wants to do in terms of rewarding people.

"We serve 9,000 people globally which becomes interesting because each country has its nuances. It's great because I get to expand my knowledge of reward in each country."

ALP: Do you alter the reward strategy per country or change the communication approach at all?
AB: "We try to 'act global' and have one streamline approach that we try to implement locally."

ALP: Where does reward sit in Travelex?
AB: "Under HR."

ALP: Does payroll also sit under HR and

if so, do you work closely with the payroll team?
AB: "Payroll sits under HR, but sits separately to reward. However, we work quite closely together and we have a great relationship."

ALP: Would you say reward skills are transferable globally?
AB: "Yes, definitely. Reward is easy. When I say easy, I mean it's simple if you keep it structurally simple - then it's just easy to implement. It can be a box and you can work within that box, I don't know why people make it more complicated. However, I do enjoy being innovative - getting to design, create and implement new things."

ALP: Do you think the reward role is exciting?
AB: "It can be, where I get the excitement from, or the fun, is if it's a sensitive topic. Let's be realistic here: Nine out of 10 people come to work to get money. You don't come to work to sit down next to someone and talk about your weekend. Let's be real, it's about money.

"Working culture, benefit packages and so on play an important part, but the be all and end all is money. So if you have an opportunity to influence that, set company strategy and policy on how fairly we pay people, then it becomes exciting. For me, at least."

ALP: I really enjoy learning about reward - sometimes I think I may even like to take it up as a career.
AB: "What I will say is, it's a sensitive role and I genuinely think it's not cut out for everyone. I have seen people who can't deal with what they see they - they can't accept it and they can't keep working at that company any longer.

"Not everything you see will sit right with you. My advice: as soon as you leave the door, you need to be able to not think about it anymore."

ALP: There is so much data within payroll and HR that reward can tap into,

Amiel Barrimond: THE CV

Global head of reward
Travelex
Jan 2020 - present

Global reward manager
Travelex
May 2018 - Dec 2019

Global reward business partner
Travelex
April 2017 - April 2018

Reward manager
Mizuho International
Nov 15 - Dec 16

"Let's be real, it's about money"

but many don't utilise it. How do you use the data available?
AB: "Many reward professionals don't use the data available to them because it's not fully clean. It's a hindrance. You could extract a small sample that's clean and use that, but in a dream world you would be able to extract any data, it be clean, and use it.

"Maybe it should be part of the reward team's role to ensure your data is clean - support HR in that essence. That's currently where I am in my plan to use data."

ALP: Do you think gender pay gap reporting will be sufficient in the future?
AB: "No. For one, I have a fundamental issue with the way the government has decided to measure the pay gap. I do not think it is a fair and accurate measure of a company's gender pay gap. That being said, is it a good initiative? Yes. Is it right to shine the magnifying glass over it? Absolutely. But what you do see, as I have, when a lot of the reports first came out is that they are all genuinely filled with fluff.

"You have to be seen to be doing or saying that you are going to be implementing something and that's great. You can't go to the public and show all your internal levels - I get the idea of where the government was coming from, but it's still not correct, accurate or even fair.

"Do I think it will fix anything? Yes, because it is on people's minds - hiring managers minds."

ALP: Is there any reward issue which keeps you up at night?
AB: "No, nothing keeps me up in reward. As I said, I think it's too structurally simple for you to make it difficult. I've never met someone who has made reward difficult."

ALP: What's the future of reward?
AB: "There are a lot of things out there that a lot of people don't do, but something I think could be in the future, which may be destructive, is the removal of bonuses.

"The concept of the bonus is sometimes lost on a lot of people. Sometimes people depend on them, they focus on it too much.

"A bonus could be anything right. For example, a company that has done well and shares some of their profits to employees who don't usually receive bonuses. For example, the wonderful Greggs sharing £7m based on the success of a vegan sausage roll.

"I understand sales incentives, because that's a great way to incentive salespeople, but these group/annual bonuses: you are getting paid to do your job already. Why are you getting a bonus to do your job? I do not like it. It's something that I think should be looked at.

"Someone once told me about a company where the staff didn't get any bonuses, but - on completion of projects or any success - the managing director would give them money to go and celebrate somewhere. People remember that celebration more than the cash that comes into their account and just disappears.

"I don't think the removal of bonuses will be something companies do - ever, but it should make people think if they are being paid fairly without a bonus. If you are going above and beyond in your job, maybe it's not a bonus that's needed but a change in job role. If you are continuously doing well, then you need to move up in the ranks - be paid fairly for the job you're doing." ■

Amber-Ainsley Pritchard, editor, Reward Strategy

THE REWARDS 2019

"EAT, SLEEP, REWARD, REPEAT"

The winners of The Rewards, which took place at the Hilton London Bankside on December 5 2019, are revealed

The Rewards 2019 was a record-breaking year for the awards programme, with the most entries ever received - 200 nominations from 100 individual companies.

Last year, *Reward Strategy* worked with its editorial advisory board to introduce seven new categories including the Best Reward Strategy, Ready to Retire and Diversity & Inclusion Awards.

The awards aim to recognise the teams and individuals that work tirelessly to ensure the population is cared for financially, physically, socially and mentally. *Reward Strategy* has even coined a new slogan to portray how hard the profession works: "Eat, sleep, reward, repeat".

The host for the evening, comedian, musician and improviser Rachel Parris, supplied more than enough entertainment for guests - in one moment, even belting out an X Factor-like performance of an original song she had written about pay and reward.

Parris is known for her appearances on the The Mash Report and the IT Crowd.

During the evening, guests raised £7,700 for the Shooting Star Children's Hospices which cares for babies, children and young people with life-limiting conditions and their families. This is the most money that has ever been raised for a charity at The Rewards.

The evening was sponsored by Cintra HR & Payroll Services, Western Union Business Solutions, FMP Global and The Payroll Centre.

Once again, the awards night followed the Autumn Update Conference (see p26). ■

Amber-Ainsley Pritchard, editor, Reward Strategy

Best Business Award - Up to 100 staff
The Payroll Centre

Best Business Award - Over to 100 staff
Liaison Group

Best Employer Award
Cintra HR & Payroll Services

Best Manager Award
Bróna Grogan, Paycheck Plus
(collected by Anne Reilly)

Best Leader Award – Up to 500 staff
Anne Reilly, Paycheck Plus

Best Leader Award - Over 500 staff
Stu Clennell, Shared Services Connected (SSCL)

Best Rebrand
Cintra HR & Payroll Services

Customer Service Award
IRIS Software Group

In-house Team Award
sponsored by Cintra HR & Payroll Services
Dorset HealthCare University NHS Foundation Trust Payroll and Benefits Team

Public Sector Team Award
Loughborough University

The Rewards category sponsors

Service Provider Team Award - Up to 50,000 employees served monthly *sponsored by The Payroll Centre*
PM+M
Highly commended: Paycheck Plus

Service Provider Team Award - Over 50,000 employees served monthly *sponsored by The Payroll Centre*
Shared Services Connected (SSCL) - Government Payroll Delivery Team

Payroll & HR Provider Award
EPM

Specialist Payroll & HR Provider Award
Dataplan Education
Highly commended: Liberata UK

Payroll & HR Software Product Award
Zellis

Global Payroll Award *sponsored by Western Union Business Solutions*
Immedis

Payroll Autumn Update partners and exhibitors

Partners

CERIDIAN
immedis – simplifying global payroll & tax
cintra – THE FRIENDLY FACE OF HR & PAYROLL
WesternUnion WU Business Solutions

Exhibitors

CHRONOMICS
cipp – the chartered institute of payroll professionals – leading the profession
EQGLOBAL
The Payroll Centre – INFORM • EDUCATE • SUPPORT
sdworx

Payments Provider Award
EQ Global

International Payments Provider Award
Western Union Business Solutions

Workplace Pension Provider Award
Smart Pension

Technology Award
Selenity Expenses

Innovation Award - Up to 100 staff
The Payroll Centre

Innovation Award - Over 100 staff
Shared Services Connected (SSCL)

Wellbeing Provision Award
ACCA
Highly commended: Everyday Loans Group

Diversity & Inclusion Award
Punter Southall Aspire

"Ready to Retire" Award
Dorset HealthCare University NHS Foundation Trust

Best Reward Strategy
Paycheck Plus
Highly commended: AS Robins

Next Generation Award – Up to 5,000 staff
Áine Crawley, Paycheck Plus
Highly commended: Amy Buttivant, Pepper UK

Next Generation Award – Over 5,000 staff
Liam Gill, Booking.com

Rising Star Award *sponsored by FMP Global*
Samantha Daly, Paycheck Plus

The Reward 300 Award
Sue Childerstone, NHS Payroll Services

Employee Benefits Provider Award
Aon

THE
REWARD 300
GALA DINNER & AWARDS

Nominate yourself or a colleague to be included in this year's index of the most influential leaders in pay and reward, The Reward 300. Entries close March 13, visit reward-strategy.com

WHAT WE LEARNED AT THE AUTUMN UPDATE

Reward Strategy highlights the key takeaways from the 15th annual Autumn Update in 2019

Amber-Ainsley Pritchard
Reward Strategy

PAYROLL
AUTUMN UPDATE
2019

Themes of financial wellbeing, global payroll, artificial intelligence (AI) and changing expectations across pay and reward, were explored at the Autumn Update 2019.

The CPD-accredited conference took place at the Hilton London Bankside, on December 5 2019.

Given the focus on workplace wellbeing in 2019 - and going forward - the morning sessions were kicked off with something a little different to usual: a guided meditation from OpenMind Wellbeing.

Throughout the day, a range of plenary sessions took place, including:

- The future of pensions from former pensions minister Steve Webb;
- The Telegraph's head of diversity, inclusion and belonging, Asif Sadiq, spoke about the organisation's new equal leave policy;
- A macro economic outlook in the UK and the impacts on payroll with Western Union Business Solutions' Karen Penney and Oxford economist Martin Beck;
- The state of play in the on-demand economy, from Tarun Tawakley, head of employment law at Deliveroo.

In the afternoon, the event split into three streams to represent the content available: A **strategic** stream included sessions on segmenting rewards, the future of AI in pay and tackling pay gaps.

A **compliance** stream focussed on payroll updates and workplace pensions.

New for 2019, a **global** stream, sponsored by Immedis, paid attention to the challenges in creating a successful global payroll and how to create cross-culture reward practices.

To shine a light on findings from the conference, here are three of *Reward Strategy*'s key learnings:

A reward strategy does not have to be tailored to specific demographics

During a panel session on segmenting rewards, delegates heard from Elly Murphy, benefits partner at LV, Suzanne Foody, benefits and reward manager at Senior Sunrise Living UK, and Megan O'Shaughnessy, head of reward - consumer, at BT Centre.

Hazel Robinson, associate director of reward, recognition and payroll at Brunel University London, chaired the debate and asked the panel if reward strategies are due a "new generational structure".

Murphy did not think so. She explained that people may differ in age and demographic, but it's not to say they want different things. She said it may be better to have a one-size-fits all approach and let people handpick their benefits.

Foody explained that it's not about tailoring individual packages to different demographics, but about communicating relevant benefits at different life stages.

O'Shaughnessy added it's important not to implement certain rewards because it's what you assume the workforce wants - you need to ask them what they want.

The questions you need to ask when choosing a global payroll provider

During a session on overcoming challenges to create a successful global payroll, the key questions to think about were discussed:

- Where are your outputs and data?
- How much control do you want?
- What language do you communicate in?
- What support model do you want?
- What are the analytics for reporting?

Gender pay gap reporting won't be sufficient in the future

Pay gaps are changing and it's not just enough to report on gender alone anymore, especially when more people are identifying differently, such as non-binary or agender.

Some companies have even been advised of removing people that don't identify as male or female from their pay gap reporting data, so the panel session - on tackling pay gaps - called for a change in reporting going forward.

The session, which also focussed on pay transparency, featured Aaron Mudd, European pay and benefits manager at Lush, Mat Davies, HR director at Addison Lee, Joanne Rees, head of people strategy and planning at Marks and Spencer, and Charles Cotton, senior performance and reward adviser at CIPD.

Davies said: "People don't like talking about money, but in work it's the case that the higher up the food chain you are - the less people want to talk about money. But the transparency piece is important - you need to find a way to be comfortable about how information can be shared."

Mudd explained how Lush gathers a group of employees to talk about how much they are paid and what they think about it, in a bid to increase transparency.

Davies added: "Sometimes trying to do the right thing, in sharing information, is taken out of context and we worry about the consequences of people comparing themselves to each other." ■

Amber-Ainsley Pritchard, editor, Reward Strategy

Find out more about our next event, the Payroll & Reward Conference on p24.

HOW 'JACK'S LAW' WILL WORK

Helen Hargreaves guides payroll managers through the conditions of the impending parental bereavement legislation known as 'Jack's Law'

Helen Hargreaves, *CIPP*

"Employers won't be able to request a death certificate as evidence"

> "The leave must be taken within 56 weeks"

Losing a child must be one of, if not the most, traumatic experiences that anybody could have to endure and historically, there hasn't been anything explicitly written within legislation to support working individuals who find themselves in this unfortunate position. In recognition of this the government announced that, from April 2020, it would introduce *Statutory Parental Bereavement Leave (SPBL) and Pay (SPBP),* as per the *Parental Bereavement (Leave and Pay) Bill,* which received Royal Assent in September 2018.

The new policies will apply to staff who lose a child under the age of 18 or who suffer a stillbirth from 24 weeks onwards. Employers will be required to allow employees to take a certain amount of leave and will also need to pay SPBP to staff members meeting certain qualifying criteria. This is not voluntary and will be mandatory from the new tax year.

How it works

The entitlement to two weeks' unpaid leave will be a day one right. If the employee has 26 weeks' worth of continuous employment at the 'relevant week' and they earned at or above the Lower Earnings Limit (LEL) in the 'relevant' period, they can be paid for this leave.

- The 'relevant week' is the week (ending with a Saturday) before the week in which the child dies.
- The 'relevant period' is the period of eight weeks ending with the 'relevant week'.

The payment figures mirror the other statutory parental payments, matching that of statutory maternity pay, statutory paternity pay, statutory adoption pay and shared parental pay. Where other statutory parental payments increase in line with a new tax year, so too will the payments for SPBP. Similarly, businesses will be able to reclaim 92 percent of SPBP payments through their Employer Payment Summary (EPS), or 103 percent if they qualify for Small Employers' Relief, again to match the treatment of other statutory parental payments.

Conditions

There are conditions surrounding when the leave needs to be taken, which is within 56 weeks of the date that the child died. There is the option of taking two weeks of leave in one full block or taking two separate blocks, each a week in length, should the employee prefer. This again ensures consistency and means that SPBP is aligned with the processing and recording of current statutory payments.

The theory behind allowing the leave to be taken in two blocks and being given as long as 56 weeks to take that leave is that it will allow employees to take a weeks' leave when they initially require it (for example, immediately after the death of the child), but they can then allocate time off around the anniversary of the child's death - as this will inevitably be a period of further upset and distress for the parents at a time when they may not feel that they can face being at work.

Updated guidance released by HMRC includes clarification about the staff member's relationship with the deceased child and confirms that they do not necessarily need to be the child's biological parent, but would need to be classified as the 'primary caregiver' of that child in order to qualify for statutory leave and/or pay.

The guidance also provides clarity on the topic of evidence required, both in scenarios where pay will be granted and in those where it will not and the employee is only eligible to take a period of leave.

In circumstances where the employee has a right to pay, they will need to sign a declaration which confirms they meet the criteria for parental bereavement pay. This is to protect both the employer and the exchequer from any fraudulent activity. There will be no strict timeframes imposed on when this needs to be provided and a flexible approach is recommended due to the sensitive nature of the situation.

To avoid further distress to the employee, employers will not be able to request a death certificate as evidence. In fact, in cases where the employee is only entitled to take unpaid leave, they will not be expected to provide a written declaration prior to their period of leave at all.

The new initiatives launched by the government, in relation to the issue of statutory parental bereavement leave and pay, are to be applauded as it is definitely time that some assistance was given to workers who have to try and cope with life after losing a child.

There was overwhelming support for the new proposals at consultation level, which clearly demonstrates that this is a subject close to the hearts of payroll professionals, but it is undoubtedly an emotive topic for people working within a whole range of industries.

Whilst the statutory provisions are welcomed, this does not mean that employers have to limit the length of time off permitted, or the payments in relation to parental bereavement, to the minimum - which must be observed by law. More conscientious companies may seek to allow longer periods of absence and higher rates of pay, if they wish. ■

Helen Hargreaves, associate director, policy and membership, CIPP

COULD THIS BE THE DECADE FOR PAYROLL?

Ian Hodson predicts future trends of the workplace and how they could affect payroll

Ian Hodson
University of Lincoln

> "We will see criminals targeting smaller companies"

A lot has changed in the last 10 years and now that we have entered 2020, I thought it would be interesting to look ahead to what we may expect to see, in payroll, in the next 10 years.

> "Co-working could open up career pathways for payrollers"

Cybersecurity
As more and more professionals are working with cloud-based applications, managers are becoming concerned over the risks of working on remote servers which could open employers up to hacks and security breaches.

We often underestimate the payroll database and the significance of the data it holds: names, addresses, NI numbers and bank details – enough to support identity theft or the rerouting of wages.

It's possible, that as we move further through 2020, we will see criminals targeting smaller companies as the larger companies have invested more on protecting their servers.

Going forward, you should expect to see the need for additional software, security training and incident contingency planning as a key priority.

On-demand culture
We can expect to see the continuation of faster, convenient and transparent services being the request of payroll customers. This will mean making sure that submitting data and seeing the output of payrolls is available 24/7.

In respect of solving problems, chatbots will become more prominent as an efficient way of automating query resolution. We can expect to see payroll departments formulating their frequently asked questions in to flows that can allow responses to be found by key word triggers. This could free up time for payroll teams, if developed correctly.

Learning culture
We will see a rise of self-skilling and upskilling as the next generation enter the workforce with their urges to constantly learn and find out the answers to their own questions. This will create an opportunity for payroll teams to get out of the office and share their knowledge.

As we settle into the new decade, we will see day-to-day financial challenges, including individuals with less disposable income, very present - so making the right informed financial decisions is critical. Creative communication plans and a proactive approach to sharing knowledge will find the better teams out and about in the business.

Artificial intelligence
The introduction of 5G and the concept of always being 'on' will drive an increase in machine-to-machine technology. This could present a range of new developments, for one we could see all forms of data gathering completed through automation from phones and tablets without prompts. However, a rise in the capabilities of technology does not mean we will lose human touch in payroll, but it will give those leading the function more time to focus on strategic decisions.

Talent hubs
Co-working spaces will be the most popular way of working going forward, allowing creative minds to inspire each other with entrepreneurial ideas.

Those who work in payroll always develop a really good understanding of the business operations through understanding overtime, absence, shift patterns and what goes on in different areas of the business. Overlay this with the knowledge that comes from processing labour costs and people data, will see payrollers thrive in a co-working space - giving them the chance to open up career pathways and have them stretch to the very top table.

Gamification
Presenting data in a way that engages employees will grow as we move the workforce on generationally.

If you think about how we award virtual trophies or attribute points for supporting saving habits or submitting data on time, it's easy to see how this could be replicated to engage employees with other financial information, such as understanding tax or student loans.

Data
We have more data available than ever before and the next 10 years will see us better utilising it.

Data can be used to strategically make a smarter workforce, operationally to make organisations smarter and to add value around key operations of the HR and pay functions.

We can also expect to see data play a greater part in recruitment decisions and promotion opportunities.

Corporate wellness
As the number of employee absences rise, due to mental and financial wellbeing issues, more corporate wellbeing programmes will be implemented to increase wellbeing and therefore engagement and productivity.

Lower rates of absenteeism and turnover will feature in many objectives for the new decade.

The next 10 years present as many challenges and opportunities for payrollers, as the last decade did. ■

Ian Hodson, head of reward, University of Lincoln

IR35: WHERE ARE WE NOW?

The latest review of IR35 is due to conclude soon, but Caroline Harwood says you shouldn't wait to prepare. Here's what to do now

Caroline Harwood, *Crowe UK*

> "Engagers and contractors should make themselves aware of their new responsibilities"

Draft legislation was published in 2019 setting out significant changes to IR35 from April 2020, moving responsibility for determining whether PAYE/NICs should apply from the personal services company (PSC) to the engager (the client) and for deducting the correct amounts to the party paying the PSC (the fee payer).

The new rules have been met with concern from contractors and engagers, therefore the government has commenced a review of IR35. The results are due mid-February.

Given short timescales and that substantive change is unlikely, all parties involved should make themselves aware of their new responsibilities now:

Check if you are within the scope of the new rules: They apply to all public sector bodies and medium/large organisations in the private sector.

Check who is engaging off-payroll workers: Consider HR, finance or procurement.

Map off-payroll workers and determine all parties in the labour supply chain: Include agencies or other parties as well as the worker and PSC.

Check whether intermediaries are caught by IR35: Include companies where the worker broadly has a five percent interest; partnerships where the worker is a 60 percent partner or you are the only client; or some individuals; and where the worker receives a payment which should be treated as employment income.

If the intermediary is not caught, then the engagement is outside IR35.

Check if you're the client and/or fee payer.

The client must assess employment status of the worker: Use the HMRC tool 'CEST' as the first test. If you answer the questions completely and correctly, HMRC should stand by the output. However, CEST has its own inadequacies. If it gives an indeterminate answer or one you disagree with, seek specialist advice. Determining employment status for tax is not easy as there is no statutory test, it differs from employment law and the indicators of employment are determined by case law. This has led to different tests being afforded different 'weight' and in recent cases, the importance of certain tests disregarded by HMRC have been highlighted.

The client must issue a Status Determination Statement: This must be to all parties in the labour supply chain.

The worker can disagree: If they do, you have 45 days to respond. There is no further appeal and HMRC will not get involved. You should ensure you have a dispute resolution policy.

From April 2020:
The fee payer must determine the Deemed Direct Payment (DDP) on which PAYE and NICs will be operated: The DDP is net of certain deductible expenses and costs of materials, so you will need a process to capture this data.

The PSC can pay the worker: This can be done via their payroll without deduction of further tax or they can receive payment in the form of dividends. They get no additional employment rights.

HMRC has confirmed that they will not normally seek tax from earlier years if the treatment has changed.

The new rules are complex and subject to further change, but make sure you are prepared for April 2020 now. ■

Caroline Harwood, partner and head of share plans and employment tax, Crowe UK

For more information on IR35, attend Reward Strategy's free London seminar, in association with Crowe UK, on February 26. Contact Jamie for attendance at: jthomas@shardfinancialmedia.com

GET BETTER AT TALKING ABOUT PAY

Companies will be required to report their executive pay gaps in 2020, so what better time to start improving your communication around fair pay. Charles Cotton reports

Pay is often at the forefront of many people's minds at the beginning of the year, and it can be a key driving factor for wanting to get a new job if they're not happy with their current salary.

Our latest *Reward Management* report, which involved research with 2,031 employees and 465 HR professionals, looked at the issue of fair pay and explored the extent to which organisations are achieving this. The survey also provides a benchmarking and information resource on current and emerging practice in UK reward management.

We found that only half of permanent employees (51 percent) think they are paid fairly and even fewer (34 percent) think that everyone in their organisation is paid fairly. What's more, only one in five workers (20 percent) think the pay of their chief executive (CEO) is "about right".

These findings suggest there's a good degree of unhappiness among people about their pay and that of their colleagues.

Are people right to feel hard done by?

There is certainly plenty of evidence which suggests so: wages have been squeezed year after year, gender pay gap reporting has highlighted the difference in earnings that persist between men and women and a strong link between high levels of executive pay and company performance has yet to be found.

However, without looking at this on a case by case basis it's impossible to say - categorically - if people are being paid fairly or not. And to complicate matters further, we know that the definition of fair pay is subjective, both to individuals and companies.

What the report does make clear, though, is that companies can be better at communicating their pay policies and encouraging line managers to have conversations about it. Three in five people (60 percent) report that their line manager has never explained to them why they get paid what they do, while those that do are not rated highly. Furthermore only a third (30 percent) of employers have a definition of what fair pay means within their organisation.

If people aren't paid fairly, whether that's real or perceived, employers can reduce their chances of attracting and retaining the best talent. They also miss the opportunity to improve employee performance and wellbeing.

How you can help

To help organisations improve their pay practices, we would encourage them to have a clear definition of fairness which is developed with input from staff.

We also want to see organisations writing a narrative which explains to staff and other stakeholders what skills, behaviours, performance and values it wants from employees - and how in return it will reward and recognise these.

HR and reward teams can help to ensure that people managers are supported in their role as communicators and decision-makers, such as through training or toolkits. As well as ensuring that people managers have the skills to talk about pay, we must also make sure that they are willing and have the opportunities to do so.

Finally, we would encourage medium and large employers to carry out an equal pay audit on a regular basis. This will help them to check that they are complying with the law and can be used to deal with staff queries about pay fairness. ■

Charles Cotton, performance and reward adviser, CIPD

Charles Cotton, *CIPD*

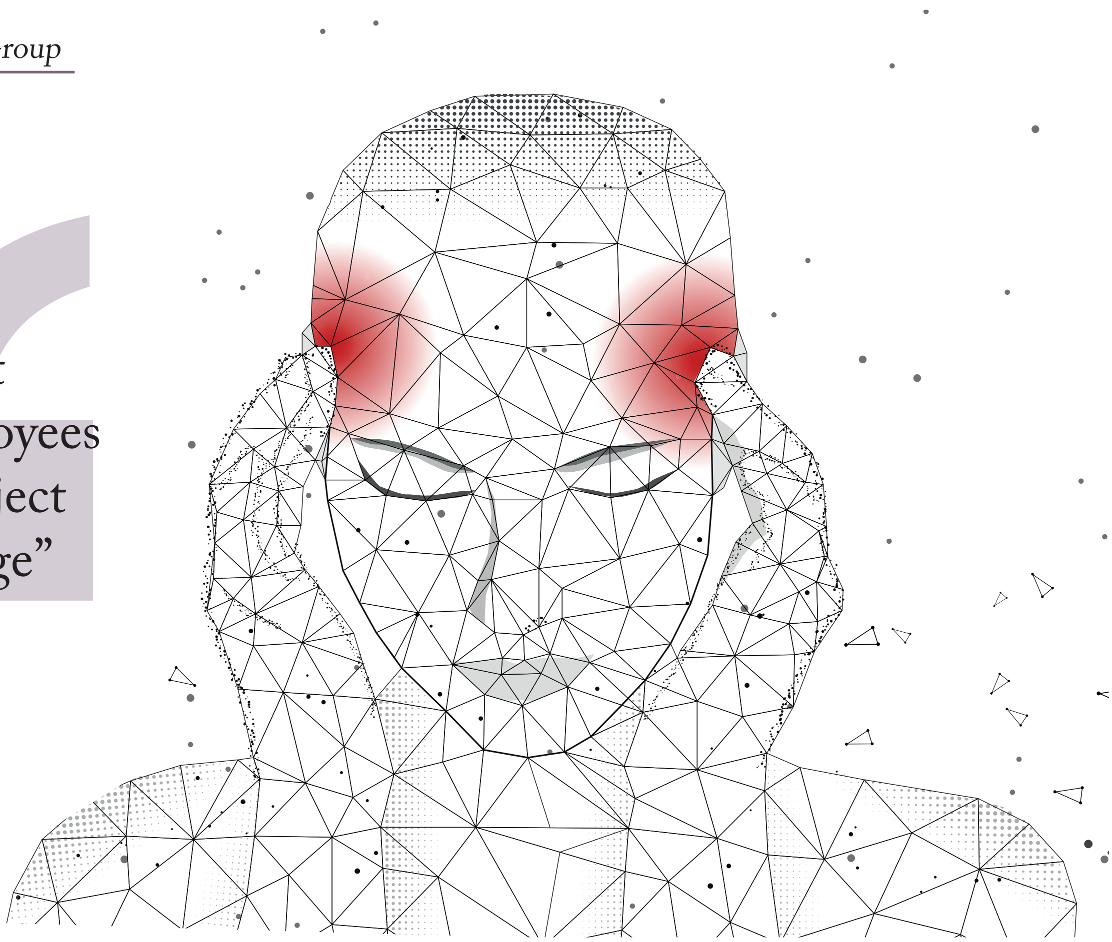
> "Only a third of employers have a definition of fair pay"

EASE THIS PENSIONS GROWING PAIN

Kay Ingram explains how the pensions tax relief tapered annual allowance is affecting high earners and what employers can do to reduce its impact

Kay Ingram, *LEBC Group*

"Payroll cannot forewarn employees potentially subject to the tax charge"



> "Legislating for one profession only is not justifiable"

Of all the changes introduced to pensions savings tax, since it was overhauled in 2006, the reduction of the annual allowance for certain taxpayers has had the most unintended consequences. These have been brought into focus in the NHS where senior clinicians refuse extra shifts, routinely used to reduce waiting lists, to avoid extra pay, resulting in more pension and an immediate tax liability.

Health secretary Matt Hancock sought to placate the doctors by offering them the option of reducing their pension benefits to avoid the extra tax charge, a proposal roundly rejected by the British Medical Association. This was followed up with a mid-election pledge to allow the NHS to pay the clinicians tax bills for them for 2019/20. While this solved the immediate problem of growing waiting lists in the NHS, it has not resolved the wider issue which affects all high earners, not just doctors, but anyone whose total taxable income exceeds £150,000 and potentially those with over £110,000 of income and a generous employer pension scheme.

Bizarrely, the definition of income for the purpose of the tapered annual allowance goes beyond earned income or self-employed profits and includes all taxable income. A windfall of dividends or interest, rent or maturing investments all count towards the £110,000 and £150,000 income thresholds which trigger the tapered annual allowance.

How does the annual allowance work?
The annual allowance is the amount which can be saved in a pension with the benefit of tax relief. Relief not used in earlier years can be carried forward for three years. Relief is granted at the top marginal rate of tax paid. If the allowance, including carry forward relief, is exceeded a tax charge at the taxpayer's marginal rate of income arises on the excess and is payable via self-assessment.

The tapered annual allowance was introduced for those with taxable income in excess of £150,000, but with the potential to also catch those with taxable income over £110,000, where an employer also pays into the pension. These taxpayers have an allowance reduced from the standard £40,000 per year. For every £2 of income they lose £1 of allowance until those with income above £210,000 have a flat allowance of £10,000 per year.

How are pension savings valued for annual allowance purposes?
This is straightforward for those with defined contribution pensions - it is the total of all pension savings made in the tax year, including third party payments. For them, the difficulty is calculating how much of the allowance they have left, especially if their pay fluctuates or they receive one-off investment income. Employees who routinely receive fluctuating pay often do not know their total pay until near the end of the tax year. Payroll has no knowledge of investment income and so cannot forewarn those employees potentially subject to the tax charge.

Those with defined benefit schemes also struggle with fluctuating pay which changes their allowance. Keeping track of the annual allowance usage is more complex and can often not be known by the taxpayer until after the end of the tax year. The increase in the defined benefit pension earned in the tax year is calculated, adjusted for inflation (CPI) and then multiplied by 16. Any additional defined contribution payments are added to this (see boxout overpage).

Defined benefit schemes are not required to give members information about the amount of annual allowance used up until many months after the end of the tax year. By this time a large tax bill may have been incurred. It is this uncertainty which has caused senior doctors to refuse extra shifts or opt for early retirement and senior police officers and teachers to refuse promotion.

Where the tax bill is over £2,000, schemes are obliged to pay it on behalf of the member, but must make an adjustment to the eventual pension including interest for the advance tax payment. Members who use the scheme pays facility do not know until retirement how much pension they will forego to fund it.

While the treasury's aim in reducing tax relief on pension savings for the higher paid was to save public spending, the unintended consequences of senior public sector workers declining further responsibility and extra work has been a tremendous own goal.

Reducing the impact
It is often assumed that private sector employers routinely compensate staff for loss of tax relieved pension contributions. Employers are under no obligation to do so and practice varies. Some employers take the view that the taxation of pension savings is a fact of life beyond their control and make no special provision for the staff affected. This can lead to higher paid employees seeking alternative remuneration by way of higher salary or

other benefits. In most cases this will be less tax efficient for the employer as an employer's national insurance (NI) will be payable, whereas pension saving do not incur NI.

One solution is to restrict employer pension payments for all earning above the £150,000 pay threshold to no more than £10,000 a year. Some employers then pay cash in lieu of any extra pension contribution, in most cases this is reduced to take account of the employer NI payable, so that it remains cost neutral. This offers simplicity and avoids the possibility of a tax charge arising, but is less tax efficient for the employee because it does not cater adequately for those employees whose fluctuating pay means that their annual allowance varies from year to year.

Where cash in lieu is offered, it is advisable to have in place rules which clearly set out the conditions under which this will be paid and a process which avoids employees opting in and out of full membership of the scheme at will.

Employers who offer fluctuating pay to staff earning between £110,000 and £210,000, where their annual allowance is likely to vary from year to year, may offer access to financial advice and guidance. Employers can pay up to £500 per year per employee for financial advice as a tax-free benefit. They can also consider moving bonus payments to an earlier pay period so that employees have time to work out their remaining allowance and to consider a bonus sacrifice into pension before the end of the tax year. The employees affected can maximise their tax relieved pension savings in the years when the allowance and carry forward relief allows, but avoid incurring additional tax charges when their allowance falls.

For those with defined benefit pensions, a sudden increase in salary can have large tax consequences. If scheme rules allow, some pay can be reclassified as non-pensionable or slower accrual rates may be adopted or the incremental rise spread across a longer period.

Employees in this pay band are typically senior decision makers. Their partial exclusion from the pension scheme can mean that good governance becomes less of a priority and that charges made for fund management are less competitive. Excluding the higher paid has consequences for all staff. By helping employees avoid the "cliff edge" impact of the tapered annual allowance, key staff can enjoy the benefits of a good pension scheme.

The government has promised an urgent review of pensions savings tax. Legislating for one profession only is not justifiable. Hopefully the NHS' problem will lead to a rethink of this for all pension savers. If not, employers can take steps to alleviate the full impact on their staff. ■

Kay Ingram, director of public policy, LEBC Group

EXAMPLE OF THE ANNUAL ALLOWANCE CALCULATION FOR A DEFINED BENEFIT SCHEME

Alison has 21 years' service in a scheme which offers 1/50th of pensionable salary for each year of service. Pensionable salary of £120,000 at start of year, £125,000 at end of the year. Total taxable income in the year is £160,000. CPI 1.7%.

Tapered annual allowance = (£40,000 – (160,000-150,000/2) =£35,000

Pension at start of tax year 20/50 x £120,000 =£48,000 x 1.7% = £48,816

Pension at end of tax year 21/50 x £125,000 = ££52,500

Pension input £52,500-£48,816 = £3,684 x 16 = £58,944

Pension input in excess of tapered allowance £58,944-£35,000 =£23,944

Tax charge, assuming no carry forward relief, £ 23,944 x45% = £10,774

HOW TPR CAN HELP YOU

Director of supervision at The Pensions Regulator, Mike Birch, explains how the watchdog works with at-risk schemes

As well as our ongoing supervision of schemes, we also deploy rapid response and event engagement teams to ensure savers remain protected in the event of corporate transactions.

Our teams worked on around 150 different interventions between July and September last year.

The event engagement teams respond quickly to circumstances which pose increased risks to schemes, including corporate restructuring, major transactions, employers in financial distress and reports indicating poor governance or administration.

Our interventions are prompted by market intelligence, whistleblowers, actuarial valuations, notifiable events and breaches of law, trustees, advisers and the Pension Protection Fund.

When we engage, our first point of contact is usually through the trustees or scheme manager. We seek to establish how trustees are assessing and responding to the event we have identified, offer recommendations where needed and expect them (and their advisers) to take that guidance into account. Where required we will engage more directly with the scheme employers and other relevant stakeholders.

Employers should expect us to engage early where significant corporate events, that have the potential to cause material detriment to the scheme, occur. We will look to establish that trustees are appropriately equipped, advised and doing what we would expect, and that employers are sharing adequate and timely information with trustees.

Where we do engage more directly we will look to support the trustees through any negotiations to achieve the best outcome for savers. A recent example of this is when we intervened following the announcement that an international parent company was closing its UK operations. On the day of the closure announcement we contacted the trustees to request information for our initial assessment of the situation, within five business days of initial contact we held a call with the trustees and their advisers.

Our discussions with trustees on the call, and in subsequent meetings, focused on the package of proposals offered by the parent company. These proposals were conditional on the trustees agreeing to enter into a legally enforceable memorandum of understanding (MOU) within one month. Working with the trustees we challenged the proposals and tested the tight timeline set for the agreement of the MOU, while supporting the trustees in moving forward with the negotiations as rapidly as possible.

We also gave feedback to the trustees on a number of technical aspects of the proposals with the view of working towards an acceptable outcome. Despite the fluid and fast-moving nature of the discussions, we were able to support an agreement between the trustees and the parent company that was concluded very close to the one-month time frame.

Requests for information

We will also take action where there is failure to respond to a Section 72 notice requesting information. We issued 18 of these notices between July and September last year.

If the person fails to respond to the notice, we may start a prosecution – as we did twice last year. The first was an individual who failed to give us information needed to investigate their automatic enrolment compliance and pension contribution payments. The second was the director of a trustee company who was asked to provide information about scheme funds he had invested in another company he owned.

Pension professionals and employers should ensure they respond to our requests with accurate and up-to-date information. Those we prosecute are tried in a magistrate's court and may be fined an unlimited amount. ■

Mike Birch, director of supervision, The Pensions Regulator

Mike Birch, *The Pensions Regulator*

> "We offer recommendations and expect trustees to take them into account"

EMPLOYMENT LAW

GUIDANCE

ESSENTIAL READING

CHANGES YOU NEED TO KNOW

Madeleine Mould recaps the raft of changes employers need to prepare for ahead of April 6

Madeleine Mould, *Blake Morgan*

"There's no indication the IR35 review will delay the planned implementation date"

This year is set to be full of changes. Some remain quite unknown (Brexit), while others - within employment law - can be predicted with a degree of certainty.

National Minimum Wage (NMW) rates

New National Living Wage (NLW) and NMW rates will apply from April 6 2020 (subject to parliamentary approval). The government has also announced its intention to phase out the 21-25 age rate, starting by extending the NLW to those aged 23 and over from April 2021.

Holiday pay reference period

The reference period for calculating average weekly pay for holiday pay purposes, where there are no normal working hours and other specified circumstances, will be extended from 12 to 52 weeks. Weeks in which no work is done will be ignored, but the maximum length of the reference period will be capped at 104 weeks.

Parental bereavement leave

The right to parental bereavement leave is due to come into force in April 2020. See p28 for details.

Taxation of termination payments

From April 6 2020, employers' class 1A NICs will be chargeable on any termination payments in excess of £30,000. This brings the treatment of termination payments, for NICs purposes, in line with the rules on taxation of termination payments.

Off-payroll rules in the private sector

The off-payroll working rules tightening up on IR35 compliance are due to be extended to the private sector with effect from April 6 2020. See p32 for details.

Agency workers

The so-called Swedish Derogation, where agency workers who are paid between assignments do not have the right to pay parity with permanent staff after 12 weeks, will be repealed from April 6 2020. Separately, employment businesses will have to give work-seekers a "Key Information Document" including certain specified information before agreeing further terms.

Changes to required employment particulars

The right to receive a written statement of particulars will be extended to all workers and employees from day one of their engagement. Additional details will be required in statements/contracts for those starting on or after April 6 2020, including details of any training requirements, provisions around probationary periods and details of entitlements to paid leave (although paid leave details can be provided in a separate document). Existing employees will have a right to request an updated statement meeting the new requirements, if it is specifically requested. If changes are made which relate to the additional requirements, details will have to be provided within one month - even for existing employees/workers.

Further legislation expected this year

- Extending redundancy protections for expectant and new mothers returning to work after maternity leave (and possibly changes to other types of family leave);
- Additional paid leave entitlement for parents whose children spend two or more weeks in neonatal care;
- One week of leave for unpaid carers;
- Right to request a more predictable work contract;
- Single enforcement body for employment rights;
- Potential requirement to offer flexible working;
- Strengthening rules on tips.

Key upcoming cases

Royal Mencap Society v Tomlinson-Blake
This case will be heard from 12-13 February 2020 and will address how sleep-in shifts should be viewed for the purposes of NMW legislation. The Court of Appeal held that sleep-in workers are only entitled to receive NMW when they are awake for the purposes of working. This followed on from a complex array of cases at Employment Tribunal and Employment Appeals Tribunal level. It is hoped that the Supreme Court decision will provide a clear conclusion.

Uber BV and others v Aslam and others
From 22-23 July 2020 the Supreme Court will hear arguments as to the employment status of Uber drivers, the Court of Appeal having previously held that the drivers were workers for the purposes of the *Employment Rights Act 1996, Working Time Regulations 1998 and National Minimum Wage Act 1998*. Although this will undoubtedly attract a lot of media attention, it will not necessarily have huge implications for cases that follow.

Various Claimants v WM Morrisons Supermarket
We are awaiting the Supreme Court's judgment on this case. The Court of Appeal previously upheld the decision that Morrisons were vicariously liable for a deliberate data breach by one of their employees. This judgment is likely to have broader implications for the law on vicarious liability. If the decision is upheld, employers are advised to check their insurance policies to ensure that they are adequately covered for such situations.

Ali v Capita Customer Management Ltd; Hextall v Chief Constable of Leicestershire Police
The Supreme Court will consider these cases together (date to be confirmed), following the Court of Appeal's decision that failing to pay male employees enhanced shared parental pay (in circumstances where they enhanced maternity pay) was neither direct nor indirect sex discrimination, nor a breach of the equal pay sex equality clause. ■

Madeleine Mould, solicitor, Blake Morgan LLP

Payroll & Reward Conference

03 and 04 Jun 2020 | Chelsea Harbour Hotel, London

The Payroll & Reward Conference is hosted by Reward Strategy and The Payroll Centre. Since 2018, the organisations have joined forces to create the UK's largest independent payroll conference

Discounted tickets available, book now

The Reward 300 Gala Dinner & Awards

03 Jun 2020 | Chelsea Harbour Hotel, London

The Reward 300 Gala Dinner, sponsored by Cintra HR & Payroll, has evolved to include an awards element to recognise the leading lights in pay and reward

Entries to the index close March 13

Payroll Autumn Update

11 Nov 2020 | Hilton London Bankside

Shape your payroll and reward strategy at the 16th annual Autumn Update. Define next year's reward, payroll, HR, pensions and compliance solutions

Keep an eye out for a soft agenda

The Rewards

11 Nov 2020 | Hilton London Bankside

Reward Strategy presents its 10th flagship awards event, The Rewards, evolved from the Payroll World Awards

Entries to open this summer

To book: Call. **020 7940 4832** Email: **jthomas@shardfinancialmedia.com** Visit: **reward-strategy.com/events**

To sponsor: Call. **020 7940 4803** Email: **bmiller@shardfinancialmedia.com** Visit: **reward-strategy.com/events**

Bureaux

CINTRA HR & PAYROLL SERVICES

Computer House, 353 High Street,
Gateshead, Tyne & Wear, NE8 1ET.
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Email: sales@cintra.co.uk
Website: www.cintra.co.uk
Contact: Geoff Dorward
Target employee range: up to 20,000

Cintra is an award-winning provider of HR and payroll software and solutions. Cintra prides itself on service excellence, built on mutually rewarding relationships. The mission is always to pay employees correctly, on time, every time and ensure the payroll process is 100 percent compliant. Cintra ensures all clients get full access to staff for legislative and system advice and support, as well as quarterly newsletters, a user conference and user forums, alongside a dedicated Business Relationship Manager. Yet, Cintra's approach is always having someone at hand for you when you need it that really makes the difference. Cintra doesn't do voicemail – you will always get to speak to a person who is happy to help.

FRONTIER SOFTWARE

63 Guildford Road, Lightwater,
Surrey GU18 5SA
Tel: 0845 3703210
Email: sales@frontiersoftware.com
Website: frontiersoftware.com
Contact: Sales Department
Target employee range: 50+

Frontier Software's payroll service is tailored to each organisation, because we understand that each has its own requirements. From bureau to fully managed, we offer security and backup to ensure a smooth and confident payroll operation. We are auto-enrolment and Real-Time Information ready.

- Dedicated experienced payroll team
- Business disaster recovery
- BACS approved bureau
- Accurate, flexible and reliable service
- UK Processing centres
- PAYE Recognition Scheme accredited

Global payroll / HR solutions

CINTRA HR & PAYROLL SERVICES

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Cintra is an award-winning provider of HR and payroll software and solutions. Cintra prides itself on service excellence, built on mutually rewarding relationships. Cintra has formed a strategic partnership of market leading HR and payroll companies, enabling them to provide HR and payroll support in 28 different countries, offering clients a seamless global payroll solution. The partners are able to offer one integrated, cross border approach, combining strong HR and payroll solutions with excellent local expertise. The alliance has a uniform service offering, with all partners adhering to the same SLA, so you can be assured of the same high-quality service across the board.

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Frontier Software, established in 1983, is a leading provider of HR Solutions with over 16000 customers in 13 countries worldwide. Our payroll solution is available in each country of operation. chris21 is a secure multi language HR database for all organisations around the world.

- Internet/intranet 24/7 access
- Complete audit capabilities
- Employee & manager self service
- End- user customisation

Integrated payroll & HR solutions

CGI

20 Fenchurch Street,
London EC3M 3BY
Tel: +447768046231
Email: clive.fautley@cgi.com
Website: cgi-group.co.uk
Contact: Clive Fautley

The HR solutions and services provided by CGI are affordable, scalable, secure, flexible and reliable. CGI offers a full range of HR processes using its own comprehensive and established payroll software and those of other major suppliers with whom it has accredited relationships. CGI's solutions can be tailored to fit clients' requirements and are built on the backbone of technologies such as cloud and intelligent automation. Additionally, CGI can blend with multiple HR software solutions which allows CGI to shape and develop services to meet your business needs.

- BACS approved;
- ISO27001 and ISO22301 accredited;
- UK based service centres with designated delivery teams partnering with our clients for service excellence.

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world. Operating in hundreds of locations across the globe, CGI delivers an end-to-end portfolio of capabilities, from strategic IT and business consulting to systems integration, managed IT and business process services and intellectual property solutions. CGI works with clients through a local relationship model complemented by a global delivery network to help clients achieve their goals, including becoming customer-centric digital enterprises.

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FRONTIER SOFTWARE

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Contact: Sales Department
Target employee range: Unlimited

Frontier Software PLC, a leading provider of integrated HR and Payroll solutions, offers total integration across all modules. The easy to use and versatile products meet the ever changing needs of Human Resource and payroll management to organisations in the UK and worldwide. chris21 is continually enhanced and updated to keep abreast of business and government legislative changes. Additional modules include Time & Attendance, Employee/Manager self service, Learning and Development, Recruitment, expenses and health & safety. Frontier Software PLC is accredited to PAYE Recognition Scheme, ISO27001 and ISO9001:2000 and BACS approved.

INTELLIGO

78 York Street, London W1H 1DP
Tel: 0800 0390116
Email: sales@intelligosoftware.co.uk
Website: intelligosoftware.co.uk
Contact: Fiona Cullinane
Target employee range: Unlimited

Intelligo is a leading provider of corporate Human Resource and Payroll Software and Services in the UK and Ireland with clients ranging in size from 300 to 20,000+ employees. Megapay, Intelligo's owned and developed flagship payroll system integrates seamlessly with MegaHR, a web-based enterprise level Human Resource solution. Built on a shared database this allows for accurate sharing of information such as job history, salary history, holiday leave, etc between Payroll and Personnel, ensuring key employee data is entered only once. Megapay and MegaHR are available to purchase as either an On Premises installed solution or on a Software as a Service (SaaS) basis.
Additional modules include Employee/Line Manager Self Service, Training, Recruitment, Consultancy, plus much more.

Outsourced / fully managed

CINTRA HR & PAYROLL SERVICES

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Gateshead, Tyne & Wear, NE8 1ET.
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Email: sales@cintra.co.uk
Website: www.cintra.co.uk
Contact: Geoff Dorward
Target employee range: up to 20,000

Cintra is an award-winning provider of HR and payroll software and solutions. Cintra prides itself on service excellence, built on mutually rewarding relationships. Cintra's managed solution allows you to outsource your payroll administration but retain full and immediate access to your entire payroll data, direct from your desktop. Cintra will comply with all compulsory HMRC RTI filing, including a full year end service. Fully managed frees you from the chores of day-to-day payroll processing, safe in the knowledge that your payroll is being administered by a team of dedicated, CIPP qualified, bureau staff. You will also have a dedicated contact within our bureau team who is there to provide jargon free support and answer all of your payroll enquiries.

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Target employee range: 50+

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- Dedicated experienced payroll team
- Business disaster recovery
- BACS approved bureau
- Accurate, flexible and reliable service
- UK Processing centres
- PAYE Recognition Scheme accredited

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Contact: Frances McDonald
Target employee range: Unlimited

Intelligo provide trusted payroll solutions to clients ranging in size from 300 to 20,000+ employees. Its payroll software Megapay is an enterprise level payroll system that is capable of accommodating the most demanding complex payroll scenarios. Developed as a standard application, the solution is highly configurable to meet clients specific payroll needs. It is widely used throughout every industry and is available as either an installed solution or on a hosted basis. As a Certified Workday Global Cloud Partner, the system fully integrates with Workday. In addition, Megapay is PAYE Recognised by HMRC.

- RTI
- Auto-Enrolment
- HMRC Integration
- Statutory Payment Processing
- Irish Payroll Calculation Engine
- Employee Self Service
- Payslip Mobile App
- HR Integration

Software

CERIDIAN

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Website: www.ceridian.com/uk

Ceridian is a global human capital management (HCM) software company. Dayforce, its flagship cloud HCM platform, provides human resources, payroll, benefits, workforce management, and talent management capabilities in a single solution. The platform helps you manage the entire employee lifecycle, from recruiting and onboarding, to paying people and developing their careers. Ceridian provides solutions for organizations of all sizes, from small businesses to global organizations.

Software

EQ GLOBAL

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Telephone: 0844 776 1836

EQ Global is a trusted international payments provider. It helps your business pay employees on time by making complicated, business critical and time-consuming global payroll payments simple. The use of its end-to-end technology gives you the assurance that your payments processes are covered, so you can concentrate on the business activities that matter to you most.
By offering a smart solution to send and receive money internationally, EQ Global eliminates the pain points around the traditional payments process, providing speedier payment delivery more cost-effectively, and at much lower risk.
EQ Global is part of the Equiniti Group, a company with a 180-year heritage and whose clients include over 50 percent of the FTSE100 in addition to a large number of government bodies and public sector organisations.

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Target employee range: Unlimited

Frontier Software PLC, a leading provider of integrated HR and Payroll solutions, offers total integration across all modules. The easy to use and versatile products meet the ever changing needs of Human Resource and payroll management to organisations in the UK and worldwide. chris21 is continually enhanced and updated to keep abreast of business and government legislative changes. Additional modules include Time & Attendance, Employee/Manager self service, Learning and Development, Recruitment, expenses and health & safety. Frontier Software PLC is accredited to PAYE Recognition Scheme, ISO27001 and ISO9001:2000 and BACS approved.

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Website: intelligosoftware.co.uk
Contact: Fiona Cullinane
Target employee range: Unlimited

Intelligo's flagship payroll product Megapay, is the Number 1 payroll system choice for corporate organisations and the public sector. Megapay is used throughout every major industry from Manufacturing, Telecoms, Top 5 Accounting Firms, Government Departments, etc., with clients ranging from 500 to 20,000+ employees. As a Certified Workday Global Payroll Cloud Partner, Megapay is certified as interoperating with Workday HCM. In addition, Megapay also interfaces with leading T&A and Financial applications.

Software as a service

FRONTIER SOFTWARE

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Contact: Sales Department
Target employee range: 1 to 50,000

Founded in 1983, Frontier Software PLC is one of the most trusted global suppliers of HR and Payroll software and services to all areas of the public and private sectors.
Implementation of the fast growing technology platform of Software-as-a-Service (SaaS) has allowed Frontier Software PLC to meet their client's needs and produce measurable business benefits both in the UK as well as around the World.

Training / Intelligence

REWARD STRATEGY TRAINING IN ASSOCIATION WITH THE PAYROLL CENTRE

The Payroll Centre Ltd
3A Penns Road, Petersfield,
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Contact: Michael Short
Target employee range: All PAYE employers

Reward Strategy, formally known as Payroll World, has been well respected by payroll, HR and finance professionals for over a decade for incisive comment and practical advice. Now in association with The Payroll Centre, we offer a select range of CPD certified short courses to develop real skills. Courses range from the Payroll Introduction course to the Payroll & HR Update. You can find the variety of courses available online and for more information call us today on 01798 861111.

REWARD STRATEGY MEMBERSHIP

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Website: reward-strategy.com

Keeping abreast of the changes in the industry is vital to your role. Reward Strategy membership makes this easy. Membership includes the 'must read' Reward Strategy magazine, accredited payroll software and tickets to the market leading pay and reward conferences covering the payroll, HR, reward and pensions sectors. With three levels to choose from, there's a membership for every budget.

Workforce management

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Contact: Sales department
Target employee range: Unlimited

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