



Voluntary Severance Scheme for the Faculty of Humanities and Social Sciences (HSS)

1 Introduction

- 1.1 The Faculty of Humanities and Social Sciences (HSS) plays a vital role in delivering Queen Mary's strategy to be the most inclusive and diverse research-intensive university in the world by 2030. We have a positive future, with humanities and social sciences subjects as key drivers of Queen Mary's long-term mission. HSS is one of the largest faculties of its kind in the UK. The Faculty plays a vital national role in opening the doors of opportunity to cultural, social and economic knowledge, particularly for disadvantaged students who would not otherwise be able to access global excellence.
- 1.2 The Faculty faces a dynamic external environment, with a challenging set of sector-level pressures, including increased student expectations and changing needs, an undergraduate tuition fee for our local students that has been fixed for many years with little prospect of change, and negligible direct government funding for education in humanities and social sciences subjects. Some HSS disciplines have faced a significant national decline in home undergraduate student enrolments over several years; others face plateauing student demand in international postgraduate enrolments after many years of rapid growth. Like other universities in the UK, we operate in a challenging landscape and need to change with the times.
- 1.3 Over the coming years, all HSS schools and the HSS Faculty Office that supports them, will need to simplify and focus our educational offer to deliver excellent student experience and education as efficiently as possible. The Faculty will need to focus and flex our resources to best support our research base and develop our education for the medium- and long- term. This realignment is particularly necessary in the School of English and Drama (SED) and the School of Languages Linguistics and Film (SLLF), where there is a significant imbalance between our current staffing levels and anticipated future student demand. Additionally, we will collaborate closely with professional services teams to align the delivery of our educational and research initiatives, ensuring a seamless integration of support services for an enhanced overall academic environment. We anticipate future structural changes in the composition of our academic and professional services teams to support our long-term vision.
- 1.4 In light of the above context, the University has taken the decision to offer employees within HSS the option to consider and apply for voluntary severance in line with the voluntary severance scheme's ("the Scheme") eligibility criteria.

2 What is Voluntary Severance?

- 2.1 Voluntary Severance is a term which is used to describe a situation where an employee receives a payment from their employer in connection with a mutually agreed and voluntary early departure from their employment. The decision to apply for, accept voluntary severance, and mutually leave employment is an employee's voluntary decision.
- 2.2 The employer is responsible for clearly outlining the terms and eligibility criteria of a Voluntary Severance Scheme to enable employees to decide if they would like to apply. The employer

decides which applications will be approved or declined based on current and anticipated future University needs.

- 2.3 A voluntary severance scheme can provide an opportunity for eligible staff who may wish to pursue other interests or careers elsewhere, or who may be considering retiring, to do so with the support of a financial package.

3 The HSS Voluntary Severance Scheme Details

- 3.1 A Faculty-wide Voluntary Severance Scheme will be open for a limited time from **Wednesday 6 March 2024** and will close on **Monday 8 April at 12 noon**.

- 3.2 Applications received after 12 noon on 8 April 2024 will not be considered.

- 3.3 A dedicated HSS Voluntary Severance intranet site has been created for staff to access all information related to the Scheme. The intranet site can be found at: <https://connected.qmul.ac.uk/faculties/humanities-and-social-sciences/hss-future/voluntary-severance/>.

- 3.4 It is important that all employees with managerial responsibilities ensure that their staff are aware of the Scheme, particularly those who are currently away from work (e.g. on sabbatical leave, maternity, parental, adoption leave, sickness absence or those staff who may not have regular access to email communications). Should managers require further guidance or support with this they should contact HR colleagues supporting the Scheme. The HR Voluntary Severance team's contact details have been attached with this documentation.

- 3.5 Employees who meet the eligibility criteria will have the right to apply under the Scheme but will not have the right to have their application approved. Details of the application assessment process is outlined at point 7. The Moderation Panel's decision will be final and there will be no right of appeal against a decision.

- 3.6 Employees who decide to apply and may be considering retirement or accessing their pension benefits early (subject to age eligibility) are advised to request an illustration of what their pension would be from the University's Pensions Team – pension@qmul.ac.uk.

- 3.7 To support this process FAQs have been provided. FAQs include answers to some pension questions to support employees with their decisions. A copy of the FAQs have been attached with the Voluntary Severance Scheme documentation. The FAQs will continue to be updated and can be found on the dedicated HSS intranet site.

- 3.8 Employees whose applications are approved must take any outstanding annual leave prior to their departure as this will not be paid.

- 3.9 Any annual leave taken in excess of accrued entitlement will be deducted from the final pay.

- 3.10 Employees whose applications are approved will be required to seek independent legal advice from a qualified legal practitioner. The University will pay a contribution of £350 towards an employee's legal fees. A Settlement Agreement will be drawn up between the employee and Queen Mary.

- 3.11 A Settlement Agreement is a legally binding agreement which records the terms on which the termination of employment by mutual agreement takes place. Both the employee and a nominee from Queen Mary signs the Agreement and in so doing both parties agree to the terms of the agreement. The Vice-Principal for Humanities and Social Sciences (Professor Frances Bowen) will sign the Settlement Agreements for all Academic and Research staff and the Faculty Director of Operations (Lucie Langley) for all Professional

Services and Technical staff. The final date of employment will be recorded in the Settlement Agreement and the reason for leaving will be “mutual agreement”.

- 3.12 Employees whose applications are approved under the Scheme will not be eligible to undertake any paid work for Queen Mary for five years from their final date of employment. This includes returning as an employee, contractor, agency worker or on a casual basis.
- 3.13 Academic employees who leave Queen Mary may be nominated for an honorary title. Professors and Readers whose applications are approved and choose to retire may be eligible for the title of Emeritus/Emerita Professor/Reader.
- 3.14 Employees who have multiple posts can submit an application in relation to any of their post(s) if they meet the eligibility criteria.
- 3.15 Employees’ voluntary severance applications which are approved will be expected to leave the University by 31 July 2024.
- 3.16 There may be a few exceptional circumstances where some employees will exit the University at a later date to due to the needs of the University.

4 The Voluntary Severance Package

- 4.1 The Scheme and package has been approved by the University’s Senior Executive Team. The Scheme’s terms and package have also been shared with the University’s recognised trade unions.
- 4.2 The terms of the HSS voluntary severance package are outlined in the table below. For employees within the School of English and Drama (SED) and the School of Languages, Linguistics and Film (SLLF) an additional 10% will be applied to the basic package The rationale for the additional 10% for staff in these Schools is outlined in point 4.10.

4.3 The Package Details

Continuous Service Criteria	Voluntary Severance Package (including notice)
1 and up to 3 years’ continuous service	4 months’ basic salary
Over 3 years’ and up to 8 years’ continuous service	7 months’ basic salary
Over 8 years’ continuous service	9 months’ basic salary

- 4.4 Employees will not have to work their contractual notice periods. Employees will receive payment in lieu of notice. The package will therefore be inclusive of employee’s contractual notice period.
- 4.5 Depending on an employee’s grade and continuous service, contractual notice periods will range from 1-3 months.
- 4.6 The contractual notice element of the package will be subject to Tax and National Insurance deductions.

- 4.7 There will be a 10% uplift added to the voluntary severance package outlined at point 4.3 for employees whose applications are approved from the following Schools:
- The School of English and Drama
 - The School of Language, Linguistics and Film
- 4.8 The 10% uplift will be applicable to both Academic, Professional Services employees and Researchers within the Schools listed at point 4.7.
- 4.9 The 10% uplift of the total Voluntary Severance package (the combined elements of payment in lieu of notice and Voluntary Severance pay), will be added to the Voluntary Severance pay.
- 4.10 The rationale for applying a 10% uplift to the package for staff within these Schools and no other Schools is because the faculty foresees that these schools will require realignment in resourcing, academic delivery, and Professional Services support for a sustainable future. However, applications can be made by any HSS staff member who meets the eligibility criteria.
- 4.11 Voluntary severance payments which are £30,000 or under will not be subject to Tax or National Insurance deductions, as the payment is under the threshold of the Income Tax (Earnings and Pensions) Act 2003, sections 402A(1) and 403.
- 4.12 Any amount of a voluntary severance payment which exceeds the £30,000 threshold, will be subject to Income Tax and National Insurance deductions in line with the Income Tax (Earnings and Pensions) Act 2003, sections 402A(1) and 403.
- 4.13 Voluntary severance payments are inclusive of staff's contractual notice periods. The contractual notice payment will be subject to Income Tax and National Insurance deductions in line with the Income Tax (Earning and Pensions) Act 2003, sections 402A (1) and 403.

5 Eligibility Criteria

- 5.1 Employees who will be eligible to apply:
- Those who have one years' continuous service with Queen Mary at the time of submitting their application (8 April 2024).
 - Those who are employed on permanent or fixed term Contracts of Employment and are paid from core University funds.
- 5.2 Employees who are not be eligible to apply:
- Staff on casual and/or agency contracts.
 - Employees who have already given notice of their intention to leave the University and their resignations or retirements have been accepted.
 - Any type of role which would ordinarily have been eligible but has a fixed term contract end date which will come to a natural end before or by the published voluntary severance exit date (31 July 2024) and where there are no plans to extend an employee's contract.
 - Employees who are funded solely by external research grants and do not hold a core funded substantive post.

- Employees who are named researchers on a project whose departure would adversely impact on the funding and/or completion of the project.

6. Voluntary Severance Ready Reckoner

- 6.1 A voluntary severance ready reckoner has been created and has been uploaded on the HSS Faculty dedicated voluntary severance intranet site. The ready reckoner does not store information and is completely confidential. The purpose of the ready reckoner is solely to provide staff with an indicative indication of what their voluntary severance package and payment in lieu of notice would be.
- 6.2 Employees who decide to apply for voluntary severance should contact the HR Voluntary Severance team at VS-questions@qmul.ac.uk to request a formal quotation.

7. Assessment criteria for approving voluntary severance applications

- 7.1 The assessment and decision making of all voluntary severance applications will be based on the following criteria:
- Strategic and operational priorities of the Department/School/Faculty will not be significantly impacted by the loss of a post.
 - Posts which are agreed for voluntary severance will not be replaced on a like for like basis or with a similar role.
 - That the underlying costs of staffing in the School/Department must reduce by the amount expended within one academic year.
 - That via reprioritisation and/or effective realignment of the work of an area, the departure of an individual(s) would not materially impact on the workload of remaining staff in the area.

8. Option to request a meeting to discuss your personal circumstances

- 8.1 Employees can request to have a meeting with their Head of School, School Manager or line manager to ask any questions that they may have in relation to their role and the future vision of the faculty. There can also be a representative present from the HR Voluntary Severance team to answer any questions you may have about the voluntary severance scheme.
- 8.2 Requesting a meeting does not oblige you to submit an application.
- 8.3 There is no obligation to arrange a meeting. This an option to provide employees with the opportunity to arrange a meeting to ask questions to assist with their decision making.
- 8.4 Should you wish to arrange a meeting please email VS-questions@qmul.ac.uk and an HR colleague will schedule an appointment with your Head of School (for academic and research roles), your School Manager (for Professional Services and technical roles).

9 Application Process

- 9.1 If you are interested in applying for voluntary severance, you will need to complete an application form which can be found on the HSS Faculty Voluntary Severance intranet site.
- 9.2 Please read the instructions carefully before completing your application.

- 9.3 All completed applications should be sent to the following email address: VS-questions@qmul.ac.uk, no later than 12 noon on 8 April 2024.

10 Process for decision-making and by whom

- 10.1 There will be 3 stages in the decision-making process.

10.2 Stage 1

Following the closure of the voluntary severance process, applications will be reviewed, and a recommendation made by the Head of School for academic and research roles and by the School Manager/Line Manager for Professional Services and technical roles.

Your Head of School or School Manager/Line Manager will draft a paragraph to add to your application form recommending approval or decline of your application. They will provide the reasons for their decision.

10.3 Stage 2

There will be an HSS Faculty Moderation Panel to review the recommendations made by those involved at Stage 1 of the application assessment process. The Moderation Panel will make the final decisions on all VS applications.

The Faculty Moderation Panel will consist of:

Professor Frances Bowen, Faculty Vice-Principal (Chair)
Professor Dan Todman, Faculty Deputy Vice-Principal
Lucie Langley, Faculty Director of Operations
Elizabeth Gillow, Dean for Education
Professor Galin Tihanov, Dean for Research
Professor Jo Martin, Deputy Vice-Principal for Health, Faculty of Medicine and Dentistry.
Professional Services Representative from another Faculty
Alex Prestage, Head of Equality, Diversity and Inclusion

- 10.4 Sonia Sookhan, Faculty Strategic HR Partner and Sheila Collins, Strategic HR Transformation Partner, will be present to advise on process.

- 10.5 The Head of School and School Manager will provide the Moderation Panel with the details of all the applications submitted for consideration and a summary of their recommendation outcomes for the Moderation Panel to endorse or where needed request further information before confirming or declining an application.

10.6 Stage 3

The Vice Principal for the Faculty of HSS will share the voluntary severance outcomes with President and Principal for ratification, as chair of SET.

11. Communication of decisions

- 11.1 It is anticipated that the communication of voluntary severance decisions will be communicated in the form of a letter and will be sent out by email to employees from mid May 2024.

12 Equality Analysis

- 12.1 An Equality Analysis will be undertaken prior to the launch of the scheme and following the communication of decision outcomes. This information will be available for employees to view on the HSS dedicated intranet voluntary severance scheme pages.
- 12.2 An aggregate summary of the voluntary severance scheme with headline information about the profile of employees who applied, were successful, unsuccessful with a breakdown of their protected characteristics will be available on the HSS dedicated voluntary severance intranet pages for transparency of the process followed.

13 Frequently Asked Questions

- 13.1 Frequently Asked Questions will be collated throughout the scheme and will be upload with responses onto the voluntary severance scheme intranet pages for all HSS employees to view.

14. Voluntary severance activities and process timelines

Activity	Timeline
Voluntary severance information shared with the trade unions.	28 February 2024
Voluntary severance information discussed with the trade unions at the JCF Sub-Committee Meeting.	4 March 2024
Circulation of Voluntary Severance Scheme details and launch of a faculty-wide Voluntary severance Scheme. The HSS Voluntary Severance Scheme dedicated intranet site will also be launched.	6 March 2024 at 9.00am
The opportunity for employees to request a meeting with either their Head of School or School Manager.	Between 12 March 2024 and 5 April 2024
Deadline for the submission of voluntary severance applications.	8 April 2024 at 12.00 noon
HR to collate and send VS applications to relevant Heads of School and School Managers	9 April 2024
The review of voluntary severance applications recommendations by Heads of Schools (for Academic applications and School Managers for Professional Services applications).	10 April – 17 April 2024
Heads of School and School Managers to send VS applications with their recommendations to HR colleagues.	18 April 2024
HR to collate Heads of Schools and School Manager's recommendations and forward to the Moderation Panel members for their review.	21 April 2024

Moderation Panel members to review of VS application recommendations.	22-24 April 2024
HSS Faculty Moderation Panel Meeting	25 April 2024
Share with President and Principal for ratification, as chair of SET	30 April 2024
Application outcome communications sent to employees.	From mid-May
Application outcome communications sent to trade unions.	From mid-May
HR issuing of Settlement Agreements to employees.	From mid/late May
Deadline for the return of signed Settlement Agreements.	Will vary depending on the issue of each Settlement Agreement. All employees must have sought independent legal advice, have signed and returned their Settlement Agreement and provided the Legal Representative's certificate by 31 July 2024 to receive their voluntary severance package.
Voluntary severance exits	31 July 2024