



# LOADINGS, ALLOWANCES AND PERFORMANCE BONUS PROCEDURE

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## LOADINGS, ALLOWANCES AND PERFORMANCE BONUS PROCEDURE

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## 1. OVERVIEW

This procedure prescribes the responsibilities, general conditions, eligibility and actions required for the payment of discretionary loadings, allowances and performance bonus benefits consistent with the [Remuneration and Employment Benefits Policy](#) and the [University of Adelaide Enterprise Agreement \(as amended\)](#).

## 2. SCOPE AND APPLICATION

### 2.1 Inclusions

This procedure applies to all full-time and part-time staff members, it does not apply to casual staff. The procedure outlines the process for managers to follow when determining the following payments:

- Attraction/Retention Loading
- Higher Duties Allowance
- Responsibility Loading
- Performance Bonus

This procedure also includes payment of Course and Program Co-ordination Allowance, as detailed in [clause 3.10 of the University of Adelaide Enterprise Agreement \(as amended\)](#) which is treated as a loading under this procedure.

### 2.2 Exclusions

This procedure excludes pre-retirement loadings, salary loadings for clinical responsibilities and Head of School loadings.

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## 3. PRINCIPLES

### 3.1 Attraction/Retention Loading

An Attraction/Retention loading allows managers flexibility to attract and retain staff with specialised expertise in their discipline or profession, recognising the demand within the current employment market.

- 3.1.1 The loading will be paid fortnightly and is included in the salary package. As such, when the individual is on paid leave the loading will continue to apply (e.g. annual, parental leave). The loading will be expressed as a fixed dollar amount, which does not increase with salary increments or with increases to the base salary.
- 3.1.2 The Faculty/Division is financially responsible for any external salary review request. Loadings will be charged to the same cost centre to which the staff member's salary is charged and the School/Branch is responsible for the cost of the loading.
- 3.1.3 Attraction/Retention loadings (unless approved prior to the 28<sup>th</sup> December 2012) are not superannuable except as required to meet the Superannuation Guarantee with respect to superannuation payable on [Ordinary Time Earnings](#). The cost of meeting any superannuation payable will be borne by the School/Branch.

### 3.2 Higher Duties Allowance

Professional staff members who are required to perform duties at a higher level than their existing position, are entitled to payment of a higher duties allowance in accordance with clause 3.7 of the University of Adelaide [Enterprise Agreement \(as amended\)](#). The higher duties allowance does not apply to academic staff. Where:

- 3.2.1 The difference is less than 1.5% of their substantive salary, the higher duties allowance will be paid at the next appropriate increment.
- 3.2.2 It is expected that the higher duties allowance will only be granted for the period that the staff member performs the higher classified position, and that the allowance is a **temporary** arrangement (e.g. often used to back-fill for leave).
- 3.2.3 A professional staff member has been in receipt of a higher duties allowance in excess of two (2) years, they will be appointed to the higher classified position where that higher classification position is vacant and where the previous staff member will not be returning to the higher classified position.
- 3.2.4 The higher duties allowance may be adjusted if the staff member will not be undertaking the full function of the position.

### 3.3 Responsibility Loading

A Responsibility Loading provides managers with the flexibility to remunerate an academic or professional staff member who performs duties or holds a greater level of responsibility in addition to their substantive position.

- 3.3.1 A professional staff member may be paid a responsibility loading where deemed appropriate if they are ineligible for a higher duties allowance.
- 3.3.2 The loading will be paid fortnightly and is included in the salary package. The loading will be expressed as a fixed dollar amount, which does not increase with salary increments or with pay increases to the base salary and will be charged to the same cost centre to which the staff member's salary is charged.
- 3.3.3 Responsibility Loadings (unless approved prior to the 28<sup>th</sup> December 2012) are not superannuable except as required to meet the Superannuation Guarantee with respect to superannuation payable on [Ordinary Time Earnings](#). The cost of meeting any superannuation payable will be borne by the School/Branch.

### 3.4 Performance Bonus

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A Performance Bonus provides managers with the flexibility to recognise exceptional and outstanding performance in achieving specific outcomes.

- 3.4.1 Performance Bonus payments are not superannuable except as required to meet the Superannuation Guarantee with respect to superannuation payable on Ordinary Time Earnings (see definition).
- 3.4.2 The cost of meeting any superannuation payable will be borne by the Faculty/School/Branch.
- 3.4.3 The respective School/Branch is responsible for the cost of the bonus payment.
- 3.4.4 The performance bonus is a one-off payment and is expressed as a fixed dollar amount.

## 4. PROCEDURES

### 4.1 Attraction/Retention Loading

- 4.1.2 To determine when an Attraction/Retention Loading may be appropriate, the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.1.2.1 Determine whether the skills or attributes proposed to be remunerated through the loading are aligned with the University's strategic objectives and consider the ability of the School/Branch to meet these objectives if the staff member or new appointee is not appointed or retained.
  - 4.1.2.2 Determine that the skills, experience and attributes of the staff member or new appointee (to be assessed for the loading) are at a significantly high level and are in high demand within the employment market.
  - 4.1.2.3 Assess the financial position of the School/Branch, where the University is paying the loading, and its ability to commit to the payment of a loading for the period proposed.
  - 4.1.2.4 Consider consistency with other staff members receiving a loading.

**Note:** The loading can only be offered with the explicit approval of the staff member holding the relevant [delegated authority](#). The decision made by the staff member holding the relevant [delegated authority](#) is discretionary and final.

- 4.1.3 To request and approve payment of an Attraction/Retention Loading the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.1.3.1 Ensure that the loading is only proposed for a specified period up to three years, after which the loading may be renewed or ceased;
  - 4.1.3.2 Ensure that the consideration for an extension of an approved loading occurs three months before the expiry date of the loading;
  - 4.1.3.3 Provide a completed [Loading and Performance Bonus Request Form](#) for existing staff to the Executive Dean for approval, and provide justification and supporting information and documentation of the reasons for the loading. For new appointments this is requested through the Recruitment System.
- 4.1.4 Executive Dean/Corporate Manager/Divisional Head to:
  - 4.1.4.4 Consider the loading payment request recommended by Head of School/Branch within the approval limit of up to 25% of maximum [base salary](#) for the classification and within the approved budget, up to \$50K per annum.
  - 4.1.4.5 Approve or decline the loading request and any future extension.
  - 4.1.4.6 Advise Head of School/Branch, if approval is granted, and forward to the Human Resources Branch to action payment.
  - 4.1.4.7 If not approved, notify the Head of School/Branch, providing a reason
- 4.1.5 The Provost (academic staff) or Chief Operating Officer (professional staff) are required to:

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- 4.1.5.1 Consider loading payments where a loading request for any other staff member exceeds 25% of their total remuneration package.
- 4.1.5.2 Any payment or combination of payments across one calendar year which would result in a [Total Remuneration Package](#) of more than 25% above the sum of the maximum base salary + 17% superannuation requires approval from the Provost for academic staff or the Chief Operating Officer for professional staff.

## 4.2 Higher Duties Allowance

- 4.2.1 To determine whether a Higher Duties Allowance may be appropriate, the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.2.1.1 Determine whether the staff member is required to perform the whole or part of the duties of a position at a higher classification level. Where a staff member is performing some but not all of the duties of a higher classified position, the higher duties allowance payment will be calculated in accordance with the function and work value of the duties performed in the higher classified position.
  - 4.2.1.2 Complete the [Higher Duties Allowance Form](#)
- 4.2.2 To request payment of a Higher Duties Allowance, the Head of School or Branch/ Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.2.2.1 Approve or decline the request for a higher duties allowance and any future extension.
  - 4.2.2.2 Advise the staff member of the decision in writing.
  - 4.2.2.3 If approved forward the [Higher Duties Allowance Form](#) to the Human Resources Branch to action payment.

## 4.3 Responsibility Loading

- 4.3.1 To determine when a Responsibility Loading may be appropriate, the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will determine the staff member's eligibility when they undertake increased responsibility.

**Note:** A professional staff member may only be paid a responsibility loading when a higher duties allowance does not apply.

- 4.3.2 To request and approve payment of a Responsibility Loading the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.3.2.1 Consider the fixed dollar amount of base salary to be recommended for the loading.
  - 4.3.2.2 Ensure that the loading is only proposed for a specified period up to a maximum of three years, after which the loading may be renewed or cease.
  - 4.3.2.3 Complete a [Loading and Performance Bonus Request Form](#) and provide supporting information and documentation that will assist the Executive Dean/Corporate Manager/Divisional Head to authorise approval of the recommendation or otherwise.
  - 4.3.2.4 Conduct an annual review of the loading three months prior to expiry date, for discussion and budget allocation.
  - 4.3.2.5 Ensure that any review process in relation to whether to end the payment of a loading or submit a new request for a further loading commences well before the expiry of the loading so that there is sufficient time for discussion and budget allocation.
  - 4.3.2.6 The loading should also be reviewed whenever there is a substantial change in the responsibilities of the position for which the responsibility loading is applicable, where the staff member is promoted or reclassified.
- 4.3.3 Executive Dean/Corporate Manager/ Divisional Head are required to:
  - 4.3.3.1 Consider the loading payment request recommended by the Head of School/Branch within the approval limit up to 25% of maximum [base salary](#) for the position classification, within approved budget up to \$50K.

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- 4.3.3.2 Ensure that the loading is only granted for the period that the staff member performs the additional responsibilities and is limited to a maximum period of three years.
- 4.3.3.3 Approve or decline the request.
- 4.3.3.4 Advise the Head of School/Branch if approval is granted, and forward to the Human Resources Branch to action payment.
- 4.3.3.5 If not approved ensure feedback is given to the Head of School/Branch.
- 4.3.4 Provost for academic staff or Chief Operating Officer for professional staff are required to:
  - 4.3.4.1 Consider loading payments where a loading request for any other staff member exceeds 25% of the [Total remuneration Package](#).
  - 4.3.4.2 Any payment or combination of payments across one calendar year which would result in a [Total Remuneration Package](#) of more than 25% above the sum of the maximum base salary + 17% superannuation requires approval from the Provost for academic staff or the Chief Operating Officer for professional staff.

#### 4.4 Performance Bonus

- 4.4.1 Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) is required to:
  - 4.4.1.2 Determine whether the staff member has achieved an exceptional standard of performance in meeting set performance targets, within pre-determined timeframes and budget.
  - 4.4.1.3 Determine if the staff member's contribution to a defined project or outcome, both in quality and quantity, has significantly advantaged the University. This provides for the recognition of a once-off extraordinary effort/event/project.
  - 4.4.1.4 Determine whether the staff member has outstanding performance that has produced specific outcomes and where the staff member has performed exceptionally but has reached the top of their incremental steps so that an accelerated increment is not an option.

**Note:** There is no obligation on the University to pay a performance bonus in subsequent years.

- 4.4.1.6 Ensure that a staff member has participated in the PDR process. An exception to this rule would be where a bonus is paid to recognise the efforts in a once-off extraordinary event.
- 4.4.1.7 Ensure that the consideration of a bonus payment and the outcome of the request remains confidential and the decision made by the Executive Dean/Corporate Manager/Divisional Head/Chief Operating Officer or Provost and Deputy Vice-Chancellor and Vice President (Research) is discretionary and final.
- 4.4.2 To request and approve payment of a Performance Bonus the Head of School or Branch/Faculty Executive Manager/Faculty Executive Director (or delegate) will:
  - 4.4.2.1 Determine whether the staff member's performance is exceptional and their work has contributed to achieving significant outcomes/targets. Exceptional means the performance outcomes are unexpected and outside the normal substantive role and responsibility.
  - 4.4.2.2 Consider consistency with other staff members in applying the bonus.
  - 4.4.2.3 Consider the fixed dollar amount to be recommended as the performance bonus.
  - 4.4.2.4 Complete a [Loading and Performance Bonus Request Form](#) and provide information and supporting documentation that will assist the Executive Dean/Corporate Manager/Divisional Head to authorise approval of the recommendation or otherwise.
- 4.4.3 Executive Dean/Corporate Manager/ Divisional Head are required to:

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- 4.4.3.1 Consider Performance Bonus payment requests recommended by the Head of School/Branch for amounts up to 50K within the approved budget.
- 4.4.3.2 Advise Head of School/Branch if approval is granted, and forward to the Human Resources Branch to action payment. If not approved, ensure feedback is given to the Head of School/Branch.
- 4.4.4 Provost for academic staff or Chief Operating Officer for professional staff are required to:
  - 4.4.4.1 Consider loading payments where a loading request for any other staff member exceeds 25% of Total Remuneration Package
  - 4.4.4.2 Approve any payment or combination of payments across one calendar year which would result in a [Total Remuneration Package](#) of more than 25% above the sum of the maximum base salary + 17% superannuation.
  - 4.4.4.4 Consider requests for performance bonus payments where it is proposed that the staff member will receive more than one bonus payment within a twelve month period.

## 5. DEFINITIONS

### Base Salary

Base salary is the amount payable for the position as defined according to the classification standards in the Enterprise Agreement (as amended), and does not include any loadings or other negotiated salary).

### Ordinary Time Earnings

Ordinary time earnings are generally what a staff member earns for their ordinary hours of work, including:

- Regular salary
- Over-award payments
- Bonuses
- Allowances

### Total Remuneration Package

Means the whole remuneration package, comprising all salary components including base pay, loadings, allowances, bonuses and superannuation.

## 6. USEFUL INFORMATION AND RESOURCES

### 4.5 University Policies and Procedures

[University of Adelaide Enterprise Agreement](#)  
[Recruitment Policy](#)  
[Code of Conduct](#)  
[Remuneration and Employment Benefits Policy](#)  
[Conflict of Interest Procedure](#)  
[Workforce Management Policy](#)

### 4.6 Related Legislation

[Equal Opportunity Act 1984 \(Cth\)](#)  
[Fair Work Act 2009 \(Cth\)](#)  
[Human Rights and Equal Opportunity Commission Act 1986 \(Cth\)](#)  
[Work Health and Safety Act 2012 \(SA\)](#)  
[Work Health and Safety Regulations 2012 \(SA\)](#)

### 4.7 Useful web-links

[HR website](#)

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[Loading and Performance Bonus Request Form](#)  
[Higher Duties Allowance Form](#)

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