

# **REVIEW OF TECHNICAL SERVICES PROVISION 2018: ACTION PLAN**

<b><u>TECHNICIAN COMMITMENT THEME</u></b>	<b><u>KEY THEME</u></b>	<b><u>RECOMMENDA TIONS</u></b>	<b><u>LEAD RESPONSIBILITY</u></b>	<b><u>TIMESCALE</u></b>	<b><u>UPDATE MARCH 2022</u></b>	<b><u>UPDATE JULY 2024</u></b>	<b>Recommendation Status (RAG analysis)</b>
<b>SUSTAINABILITY</b>	<b>RECRUITMENT</b>	(1) Create guidance for recruiting managers on considerations to be given in replacing staff who leave including determination of the role required on a case by case basis. TRM to take the lead in identifying role requirements in conjunction with relevant parties (Research Technician post – Principal Investigator; Teaching Technician post – Head of School; Core facilities – combination.	HR to convene a short term working group including representation from Heads of School, TRM ad PI community to prepare guidelines.	Commenced March 2018	General approach outlined opposite has been adopted. The University has also recently reviewed R&S Policy again and developed a new policy and toolkit including guidance material for recruiting managers. As part of implementation of the new policy/toolkit HR will be rolling out a series of briefing and training sessions for recruiting managers during 2022. This will be an opportunity to re-emphasise the guidance.	In the majority of cases TRM/TROs take the lead on reviewing and identifying role requirements, grading of role, advertising & recruiting. This applies to all core funded technical post. The on-line Recruitment and Selection Training is available to all staff involved in recruitment. There are posts that are grant funded where a PI has been successfully awarded funding for a technician where the process is adapted. TRM/TROs take the lead along with area specialists to identify tech requirements in such cases.	Completed. Guidance created through short-term working group and implemented as a new policy alongside guidance material toolkit. Training sessions rolled out to recruiting managers.

					Update May 2024 – the training was rolled out to recruiting managers.		
		(2) Improved transparency of post requirements (to be informed by the ongoing promotions review).	Promotions Review Working Group	Commenced March 2018	<p>The University adopted a different approach to progression of Professional Services staff, including technical staff, during 2019. Following a delay due to the Covid-19 pandemic, we launched our Regrading Policy and Procedure in 2021. Since then 10 technical members of staff have been regraded to higher grade positions.</p> <p>From Gr2-3: 1 From Gr3-4: 5 From Gr4-5: 1 From Gr5-6: 2 From Gr6-7: 1</p>	Review commenced in Nov 22 by a Working Group chaired by Director of People - Project to (i) Review the regrading policy and procedure and (ii) consider career progression processes for professional services staff. This project was paused in Dec 2023 but will recommence in early 2025.	In progress. The requirement to consider post requirements has been carried forward for an action in the new action plan, taking into account the ongoing review.

<b>SUSTAINABILITY/ VISIBILITY</b>	<b>RESOURCE/ FUNDING</b>	(3) Identify an evidence based cost recovery system that can be used by staff when applying for grants. (R&I template)	Director of Research & Innovation	Commenced March 2018	There continues to be an inconsistent approach and institutional policy around this issue.	There are inconsistencies in the approach by PIs across the University. There may be some issues with engagement with TRM/TRO to discuss post requirements and relevant grading.	In progress. An institutional priority move towards fEC-rated large grant applications has seen a move towards automatic inclusion of 'infrastructure technician' . This has been reinforced by examples where technical specialist roles and their associated upskilling have been integrated into grant applications, and awards. Development of new lab spaces are now accompanied by evaluation of technical needs and

							requisite staffing and skills needs built into planning and grant applications.
		(4) Develop greater transparency regarding the taxation system/how overhead funding is distributed. (Narrative from Finance)	Director of Finance/VP External Affairs	Commenced March 2018	Completed	Still to be updated	Completed. All overheads gained through fEC-rated grant awards are redistributed to relevant schools following gross to net adjustment reflecting the fEC rate.

		<p>(5) Ensure that during any grant application process for external funding there is discussion between the person applying for the funding and the relevant TRM to determine implications for technical staffing. (Grant application cover sheet obligation for signature of TRM/O). This must include provision for technical training and servicing associated with large equipment purchases.</p>	Guidance to be prepared by R&I	March 2018 (nb depends on timescale for grants)	Work in progress	In process.	<p>In progress. The adoption of the Worktribe grant management system includes a cascading approvals process that requires School level sign-off with TRM consultation prior to elevation. Worktribe simplifies inclusion and costing of staff, including technical, members into proposals. Inclusion of facilities costs is encouraged for inclusion where rates are determined locally.</p>
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SUSTAINABILITY/ VISIBILITY	RESOURCE/ FUNDING	(6) All core facilities across the University to be identified and mapped. Strategy for maintenance and replacement of core equipment should be developed. R&I liaise with Heads of School and HR to determine who within the current cohort of technical staff falls within core facilities in order to assist in the identification of realistic cost recovery that can be built into applications.	Director of R&I/Heads of School/TRM/O	Mar-18	Work in progress	There has been some work on this by the University's Research Facilities Working Group.	There has been some work on this by the University's Research Facilities Working Group chaired now by Director of Research & Innovation. The group have helped provide BEIS money for the purchase or replacement of core facility equipment. There is still some work to be done around facility costings for other purposes e.g.commercial.
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		(7) Ensure technical input is included in forward planning within the University (for example, including the development of new buildings) to ensure the best technical support going forward.	Heads of School/ Project Sponsors	Commenced March 2018 and ongoing	Science Teaching Hub change management exercise provides an example of the approach taken at the University. Include copy of the change management documentation highlighting consultation with technical staff.	There was technical representation on new builds at Foresterhill e.g. IMS, HSB, Rowett the STH Project Board and Management Group.	Completed. Technical staff were involved in the new build planning, development, and change management processes on both main campuses including roles on Project Board and Management Groups. The current Reimagining the Campus project includes technical staff within working groups and consultation exercises. Ongoing new lab space developments include discussions with technician representatives.
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CAREER DEVELOPMENT	TRAINING AND DEVELOPMENT	(8) Develop and communicate an internal training programme for technical staff – TRM, TRO, Team Leader and Technicians (either link to existing training and development opportunities available or creation of new courses including both technical and managerial training).	Head of HR/ Staff Development	Mar-19	ILM 3 and ILM 5 attendees	Technical staff have attended the ILM leadership development programmes on offer internally.	On track. There are no current plans to develop a specific leadership development programme for technical staff. Some bespoke training in other areas has been provided by the staff development unit. Technical staff have been supported in attendance of conferences and training courses for networking and training. We have supported successful technician applications into ITSS and CTLS for fully funded Knowledge Exchange Placements.
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		(9) Set up representative group of TRM/TRO across the University to identify CPD opportunities for technical staff (e.g. HEATED, HESDA, Technician Commitment).	TRM representative	Commenced March 2018	Discussions took place but progress was halted during the pandemic.	Consideration needs to be given to open this opportunity to a wider group of technical staff not just TRM/TRO.	Action paused due to Covid and organisation change. Taken into consideration in the new action plan.
		(10) Develop a portal for technical staff to advertise internal and external development opportunities (as well as acting as a source of information and to assist with communication). This action has changed to reflect publication of the Technician Commitment portal	IT Services with TRM representative	May-18	Staff were signposted to the portal where information about events, training opportunities etc is available.	There is limited information regarding the Technician Commitment on our web-pages therefore need to revisit how this is communicated. Discussion regarding a portal with IT is in progress. UofA website is currently under review. There is also a Technical Forum Microsoft Teams site at Foresterhill where opportunities can be posted but also use e-mail to advertise ad-hoc technical training.	Still to progress. The Technician Commitment and technician's portal are inadequately advertised on UoA websites.

		(11)TRM identify and develop a skills matrix and share with other TRM/O	TRM/TRO	Mar-18	There has been a matrix used in the past but has not been refreshed for some time.	The training matrix has been used in the teaching team for many years. There would be benefit from wider use and would be a good tool to use in annual reviews. Also very good management tool to get an overview of skills gaps, potential points of failure, succession planning.	On track. In implementation across areas of the University but not routine or consistent in usage. Continued implementation essential as a management tool to get an overview of skills gaps, potential points of failure, succession planning.
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SUSTAINABILITY/ VISIBILITY	STRUCTURES & LINE MANAGEMENT	(12) Review existing structures to identify the potential for single points of failure and construct a risk register. Establish what an ideal structure would look like/consider whether this is viable in terms of resourcing and cost. (Head of School with TRM/O). This structure should address workloads across technical services.	Heads of School/TRMs	Mar-18	The coming on stream of the Science Teaching Hub necessitated a reorganisation of technician teams across several Schools, and beyond that there is further work to do to ensure that technical teams are of the right size and shape to support the ambitions of the University with regard to research as well as teaching.	With the exception of a risk register, this was completed for STH technical resource, term-time staff were made full-time/year long staff, trainee technicians were appointed to allow time to train and succession plan for retirements. There is a requirement to carry out a review and highlights the importance to continually review structures. A structure was agreed for the STH, due to staff changes, this structure is no longer fit for purpose, with a number of positions now clearly vacant and staff are having to be moved around to fill gaps - this is quickly becoming unsustainable. Reduction in overall technical staff have also identified an increasing number of single points of failure.	In progress. The recommendation was reconsidered following the development of the shared Science Teaching Hub and the reorganisation of technician teams across several Schools - which is ongoing. A review of the technical teams to determine and ensure right size and shape to support the ambitions of the University with regard to research as well as teaching remains outstanding.
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		(13)Harmonise job titles (e.g. TRO and Team Leaders) to establish consistency in the technical services structure University-wide. (move to TRM/TRO/Senior Technician/Technician); working titles agreed with TRM/TRO. Proposal to SMT/PNCC	Head of HR	Mar-18	Further progress to be made.	There has been a series of discussion and consultations regarding the most appropriate way forward for staff across the University. However further implementation has not progressed.	On track. To be considered as part of the Technical Services Review to commence in 2025.

		<p>(14) Review the current practice of deployment of technical staff across a number of different research areas and establish if an alternative model is plausible, being mindful of not having staff split across too many different roles. Propose that normally no research technician should be working in more than 2 research areas at any one time. Any extenuating circumstances where required to work more than 2 will be negotiated/agreed between line manager, TRM and the technician.</p>	<p>Vice Principal External Affairs/Heads of School/TRMs</p>	<p>Mar-18</p>	<p>This will be considered as part of the technical review.</p>	<p>This was based on a single case at IMS at the time of the original review which has been long resolved.</p>	<p>The recommendation to review deployment of technical staff to create an effective approach to best utilisation of skills has not yet taken place. It has been agreed not to progress further with this action.</p>
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<b>CAREER DEVELOPMENT/ SUSTAINABILITY</b>	<b>STRUCTURES &amp; LINE MANAGEMENT</b>	(15)Review the role of Teaching Technician and establish whether additional opportunities can be offered to expand the role (bearing in mind the establishment of a Teaching Hub over the next 4-5 years.	TRM/HR	Mar-18	This has moved on with the establishment of the Science Teaching Hub	This was addressed partially with the STH technical review. More scope to enhance their roles e.g. technical staff running skills workshops, staff undertaking placements in research over summer months as they have previously done as CLSM- if staffing and STH activities allows.	Completed. The role of Teaching Technician was reviewed as part of the establishment of the Science Teaching Hub. Outcome was demonstrated in generating additional scope to enhance roles e.g. technical staff running skills workshops, staff undertaking placements in research over summer months.
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CAREER DEVELOPMENT/ SUSTAINABILITY/ RECOGNITION/ VISIBILITY	ROLE OF TECHNICIANS	(16) Establish clarity around expectations regarding technical staff picking up other tasks out with the role of technician – e.g. porterage. Re-examine porterage facilities across the University, including a review of the cost-effectiveness of engaging external porterage facilities and clarity on the role of internal porters. (Stan/ Petra)	Vice Principal External Affairs/Director of Estates/TRM	Mar-18	This has been progressed.	There has been significant improvements in this area with clearly establishment processes between technical and portering teams. There is a good working relationship with Estates & Facilities.	Completed. Following on from review the expectations around technical staff picking up other tasks, excepting unique events, have been clarified. Porterage no longer an issue
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		(17) Re-categorisation of audio-visual/IT technicians as Professional Services rather than Technical staff. Include Estates. In general where technical services are provided in Professional Services, consideration should be given to categorising as Professional Services rather than technical services.	Director of Estates/ Director of IT/ Head of HR	Mar-18	Complete	Technician Commitment covers a variety of different technical roles therefore it may be advantageous to widen our current scope.	Completed. Recategorisation was undertaken as per the original recommendation. Subsequently the question has arisen again as part of the current self-assessment and a broader group is likely to be included in the technical review. New action is to re-evaluate.
<b>VISIBILITY/ SUSTAINABILITY/ RECOGNITION/ CAREER DEVELOPMENT</b>	<b>ROLES, GRADING &amp; CAREER PROGRESSION</b>	(18) Establish career paths for technical staff, emphasising skills, qualifications required at different levels (for teaching, research and core facilities technical staff).	TRM rep and IT	Apr-18	Regrading Policy and Procedure highlights there are career paths but further exercise needs to be undertaken to develop this further. This is on the list of activities under the umbrella of Reward.	This work falls under the remit of the Reward Group and this is to be re-established as part of its wider work following on from Harmonisation project.	In progress. Regrading and Career Development Sub-Group undertook this exercise as part of its remit. Progress was made on discussing career paths including career graded posts for Technical Staff. The work of the sub-Group paused due to financial sustainability measures and work



					<p>Regrading and Career Development Sub-Group as this was part of its remit. We made progress on discussing career paths including career graded posts for Technical Staff but the work of the sub-Group is paused due to resource being focused on financial sustainability. Further consideration of when we re-start work is Autumn 2024.</p>		<p>pressures and work being refocussed. Recommendation to be restarted in early 2025.</p>
		<p>(19)Development a programme of annual secondment opportunities (1/2 weeks duration) for all technical staff Inc. teaching to learn about other areas. Advertised on portal.</p>	TRM/TRO committee	Apr-18	<p>This has not been progressed/ needs to be picked up again</p>	<p>2 technical staff have applied to ITSS/CTLS Knowledge Exchange Programmes and have gone to Liverpool &amp; UCL for specific training that could not be delivered in house.</p>	<p>While some progress has been made via linkage with Recommendation 8 an annual programme of secondment opportunities has not yet emerged.</p>

					As above – sub-Group have discussed a secondment policy and draft created but work paused currently.	The Secondment Policy is under review and is an action for the Regrading/Professional Services career progression sub-group of the Reward Group (which is currently paused).	To be taken forward in the revised action plan.
		(20)Teaching Technicians – review grading structure (JE). Review grade profiles and compare research core facility grade profiles with teaching technician grade profiles. If significant anomalies exist, these should be examined/explore if justification for these. TRM/HR	Technical Resource Managers/ HR	Apr-18	A review is required.	Some work was undertaken as part of previous review but no further progress.	In progress. Will be taken forward through the new action plan but will link with the Technical Review will commence in early 2025.

		(21)Review recognition arrangements for technical staff (out with promotions exercise) – e.g. acting up, contributions.	Head of HR	Apr-18	During the Covid-19 pandemic promotions, regradings and contributions were frozen due to financial uncertainty. Regradings have recommenced as well as our existing contributions exercise. However, recognised that we need to do further work in this area and contribution/recognition is now the reward of the Reward Consultation & Negotiation Group	Guidance on acting up arrangements would be helpful to ensure a consistent approach across the University. Regrading process is under review as part of the work of the Reward Group.	In progress. Continues as an action in the revised plan.
	<b>ROLES, GRADING &amp; CAREER PROGRESSION</b>	(22)Develop succession planning plans for areas	TRM/O in conjunction with Heads of School	Mar-18	No significant progression in this area	Individual Schools likely do this informally where staff numbers allow. Expectations have to be managed carefully as development can often lead to the expectation a person will be regraded in their current role. However it is important to give staff the opportunities and	In progress. Substantial overlap with other recommendations including 1, 6, 7, 8, 10, 11, 12, 18, and 19. Undertaken informally across individual Schools. The staff structure at STH was constructed with succession planning in mind. Institutional guidance

						<p>the opportunities and skills to advance their careers. The staff structure at STH was constructed with succession planning in mind as mentioned above but departures and recruitment freeze means numbers are below that required and now very difficult to have a meaningful plan without replacements for some staff departures being addressed.</p>	<p>institutional guidance remains to be developed.</p>
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		(23) Review promotions process for technical staff (as part of the review of Promotions Exercise) and the support available to staff to encourage applications for promotion at the appropriate time (such as one to one advice and coaching)	Head of HR	Dec-17	Replaced with Regrading Policy and Procedure and numbers processed noted above. We also recognise that further consideration needs to be given to establishing career pathways with clear criteria for staff to progress. Update earlier in the document applies to this point	There are some concerns about the Regrading Policy which has replaced Support Staff promotions. This is the process now in place for technician progression. Additional work to consider career pathways and succession planning needs to be considered.	On track. Overlap with Rec 2, 11, 18. Undertaken as a component of the Regrading Policy and Procedure. Recognise that further consideration needs to be given to establishing career pathways with clear criteria for progression. Recognition that the job is graded not the person. Further progress can be achieved through mandatory use of Annual Review to discuss training and development needs and to include use of job descriptions/cv's during this to assess job role requirements being met.
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		(24)Ensure communication/awareness of the promotions process amongst technical staff – information sessions/workshops Inc. involvement of technical staff.	Promotions Review Working Group	January 2018/ongoing	<p>Briefing sessions when the Regrading Policy and Procedure were launched.</p> <p>These were rolled out. Intention will be to update the policy to make it more streamlined/improve based on experience. Further sessions will be implemented as part of the roll out. This is, however, part of the work of the sub-Group that is paused therefore existing Regarding Policy continues to apply.</p>	<p>This is still something that both technical staff and academic colleagues don't fully understand.</p> <p>Updating the Policy &amp; further sessions would help with this.</p>	In progress. Overlap with Rec. 8, 9, 10, 19. Briefing sessions were held with staff members when the new Regrading Policy and Procedures process was launched. Future intentions are to update the policy to improve ease of understanding and to capture user reflections. Further sessions will be implemented as part of the roll out.
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CAREER DEVELOPMENT	ANNUAL REVIEW	(25) Ensure the annual review process is applied consistently and constructively across Technical staff. This should include clarity on who should be undertaking annual reviews, the role of annual review and the expected outcomes of annual review (including developing a clear understanding of where responsibility sits for implementing the outcomes/recommendations of an individual's annual review).	Head of HR – pick up as part of review of annual review process	Apr-18	<p>Review of Annual Review was paused due to Covid-19 however this is being picked up again in 2022 and will ensure this is captured.</p> <p>Full review has not been progressed and work is now paused due to focus on financial sustainability. Meanwhile updates were made to guidance, checklists and forms to make the process clearer.</p>	Review of the annual review process to be undertaken.	Lagging. Overlap with Rec. 8, 10, 11, 14, 15, 16, 18, 19, 21, 23, 24. Review of Annual Review was paused during Covid and subsequently not reinitiated due to severe sectoral financial uncertainty. Review now reassigned to Dean of People, Culture, and Environment and occurring across 2025.
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VISIBILITY	COMMUNICATION	(26) Development of portal (see recommendation 10)  Speak to IT/resource levels	See (10)	May-18	Changed to signposting to Technician Commitment portal.	There is no mention of Technician Commitment on UofA website. This will be addressed with the introduction of the technicians webpage	Lagging. Overlap with Rec 10. This recommendation has not been followed through due to competing demands on IT resources during pandemic and subsequent severe sectoral financial uncertainty. This recommendation will be rolled forward using sector exemplars as guides.
		(27) Encourage all schools to develop a technical staff forum, adopting the model used in SBS.	HoS with TRM/TROs	May-18	Needs an update – STH will have impacted	Established forums at both Old Aberdeen and Foresterhill.	On track. Cross - campus networking events have been well received and enabled the Technician Networking team to build interactivity across the community. Fora at individual school level have not been



							adopted outside of areas where technical staff levels support this level of activity.
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		<p>(28) Develop an annual pan-University technical staff seminar/conference. Explore opportunities to collaborate with other organisations e.g. RGU, schools, oil and gas. Technical group across university.</p>	Technicians	Sep-18	Not taken forward due to Covid	<p>Partial progress. Since Jan 23 gathering at STH, there is now a cross Campus Technical Network. There has been 2 meetings per year with funding coming mainly from trade stand sponsorship. RGU &amp; James Hutton staff have been invited to meet later this year with a view to becoming involved in Forum Events.</p>	Complete. The cross campus technical network has 2 meetings per year supported by external sponsorship. Invitation extended to relevant staff at nearby external organisations. Have now joined pan-Scottish Technician Network to ensure best practise sharing and enhanced connectivity across the community. We also have an ITSS committee member.
		<p>Introduce local forum first and then develop broader conference – self manage/network</p>	Events Team			<p>University staff now part of a pan-Scottish Technician Network for sharing of knowledge, best practice related to technical skills, careers and development.</p> <p>A member of UoA technical staff is currently a serving committee member of ITSS, appointed in 2023.</p>	

		(29) Develop a schedule of monthly/bi-monthly meetings of TRM/TRO	TRM/TRO	Jan-18	TRM/TRO meetings established	These were established during the pandemic and worked well. There has been considerable change in the Technical Management Team but this could be re-started.	On track. This was established according to the recommendation and subsequently paused during covid and then through severe sectoral financial instability. To be recommenced in Autumn '24.
	<b>"THE TECHNICIAN COMMITMENT"</b>	<p>(30) Take full advantage of The Technician Commitment.</p> <p>Understand and promote better</p>	Vice Principal External Affairs/ Head of HR	September 2017/ongoing	Needs updated	Renewal self assessment and senior management support will help with focus to take full advantage.	Lagging. Severe organisational pressures distracted from the recommendation. This is now being reversed via strong technical staff directly with senior management support.