



## **Personal Development Review (PDR) Guidance notes**

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### **1. Introduction**

The Personal Development Review Process (PDR) process is intended as a constructive and proactive approach to the management and development of staff within the organisation, and should be viewed as a two-way process.

Personal Development Review is not directly or primarily related to promotion, awards for excellence or recognition awards or disciplinary action, but it is inevitable that consideration of job performance and staff development will in some cases lead to some consideration of these processes. Indeed, Personal Development Review should provide the opportunity to evaluate how well someone is working, and may reveal the evidence that could later be used to support an application for the award of additional pay under the Rewards and Recognition Scheme or possibly a re-grading. However, the main outcomes of the Personal Development Review procedure are that each individual is helped with their professional development and finds their post more fulfilling, and that the department is more efficient and effective.

Although PDR is separate from the regrading process, appended to this guidance are the University's generic grade descriptors, which might help identify the key requirements at each level.

### **2. Objectives**

To ensure that all staff in the Nuffield Department of Primary Care Health Sciences have the opportunity at regular intervals, with a supervisor or other senior member of staff: to discuss all aspects of their work, including performance; to consider their own professional development and how this can be supported by the department; to consider how they may develop their role within the department and to consider workloads.

To ensure that maximum support is offered by the department to all staff on fixed-term contracts to help their career development.

On another level, the aim of the design of the scheme is to meet these objectives with a minimum of bureaucracy and paperwork.



### **3. Principles**

All members of the department are expected to participate in the department PDR scheme. There are two different forms used in the department: one for clinicians and senior academics on Medical Sciences Division contracts and one for all other staff categories.

The PDR scheme is based on an annual discussion as part of ongoing dialogue between individuals and their line managers or supervisor. All staff who have completed their probation period should have a formal annual PDR. Different review procedures apply during the probation period.

PDR should be conducted in a supportive and fair way. Nothing in a PDR should be a surprise and it must not be used to raise performance concerns for the first time, although it is an opportunity to review issues already raised during the year under discussion.

PDR should be regarded as confidential between the individual and their reviewer. Forms are sent to the Scheme Co-ordinator (currently the Head of HR) who may follow-up as appropriate with line managers or individuals on matters raised in the PDR. The Head of Department may also review forms, particularly those of senior staff and clinicians. No-one else will see the completed the form without the permission of the reviewee.

### **4. Key points of the Departmental scheme**

#### Co-ordination

The schedule of Personal Development Reviews will be co-ordinated by the Head of HR which will be responsible for ensuring that Personal Development Reviews are carried out, keeping records and, jointly with the reviewer(s) and the individual reviewee, for ensuring that Personal Development Review results are followed up and appropriate action is taken.

#### The reviewer

The reviewer(s) will normally have responsibility for the management of the individual concerned: in most situations, the immediate supervisor is likely to be the most suitable reviewer. Where possible, any reasonable request by a reviewee for the nomination of alternative reviewer(s) will be accommodated.

#### Frequency of Personal Development Review

Personal Development Reviews should take place at yearly intervals, especially for research and support staff. Staff approaching the end of a fixed term contract should also have a meeting similar to a Personal Development Review, with a focus on progressing to another post, if this has not been discussed at a recent PDR meeting.



### The Personal Development Review discussion

The Personal Development Review discussion is central to the scheme. The discussion will provide an opportunity for each member of staff to review his or her job description, main work objectives, achievements, performance, potential, and training needs and for the reviewer/line manager to consider their view of the individual's performance against this and against the job description.

A Personal Development Review discussion can include an examination of any problems and the identification of possible remedial actions. Problems may be raised by either the reviewer or the reviewee and might be to do with performance, the management style, or the way the work is organised.

After an in-depth discussion about work content and organisation and checking whether the job description needs amendment, the second part of the Personal Development Review discussion should concentrate on (i) setting around six specific objectives with timetable and (ii) agreeing what actions can be taken to help the member of staff develop. These could include funded or unfunded formal training courses within or outside working hours; attendance at conferences; mentoring, teaching opportunities, informal training by or of a colleague; participation in new areas of work or groups; job shadowing or swapping.

Where reviewees are in the final year of a fixed-term contract, the PDR discussion should also include exploration of potential contract extensions, future projects, funding opportunities etc.

For researchers there should also be a discussion about impact-related activities as this is one of the department's measures of success under University review processes and the Research Excellence Framework

### Departmental support for staff development

The Nuffield Department of Primary Care Health Sciences provides a small annual budget from which funding for conferences or courses can be applied for. Principal Investigators are encouraged to include a sum for training in research grant budgets to supplement this funding and allow them to encourage staff working on projects to attend conferences or courses. Reviewers will need to ask their HoD or the Administrator to advise on how much of their working week they might allow their staff to spend on personal development and training, and on how to access departmental funding

### Confidentiality

Material written on the Personal Development Review form (except for comments about agreed training and support requirements) should remain confidential to the reviewee, reviewer(s), head of department (for senior & clinical posts) and the scheme co-ordinator.

It is hoped that sufficient confidentiality and trust exists for the reviewee and reviewer(s) openly to share all relevant information.



### Third-party input

Where an individual has different supervisors for different aspects of their work, all supervisors should be given the opportunity to provide feedback, usually via the formal line manager conducting the appraisal. Where it is thought appropriate to obtain the views of other third parties, such as service users or collaborators, the reviewer and reviewee should agree who will be contacted and how. Managers should not request feedback from third parties without the reviewee being fully aware of it and feedback should never be given anonymously.

### Second opinion

Any serious case of disagreement between reviewee and reviewer(s) should be brought to the attention of the Head of Department, Administration or Head of HR.

### Job descriptions

Both reviewer and reviewee should have a copy of the individual's job description as a base from which to start the discussion. If the job description has changed since the last review, then it should be amended with agreed changes and the new version of the job description sent to the HR Team to put on the personnel file.

### Personal Development Review records

Copies of completed Personal Development Review forms will be retained on staff members' files by the administration and copies should also be retained by the reviewee and the reviewer.

## **5. The Process**

### Summary

- 1) HR Team reminds reviewer(s) (reviewee's line manager) through the monthly pack that Personal Development Review is due
- 2) The Reviewer sends the paperwork electronically to the reviewee plus a copy of the job description of the reviewee.
- 3) Reviewer(s) and reviewee agree date and time of Personal Development Review discussion.
- 4) Reviewee completes Part A of the form and sends to reviewer(s) (again, probably by email), at least one week before Personal Development Review meeting.
- 5) If wished, reviewer(s) comments on material provided on the form and returns to reviewee at least two days before the Personal Development Review meeting.



- 6) Reviewer(s) and reviewee prepare for the discussion on the basis of the paperwork.
- 7) Personal Development Review discussion takes place. Both parties agree and note points.
- 8) Reviewer writes up record of discussions, objectives and agreed development plans on Personal Development Review report form and returns the form to reviewee for signature.
- 9) Completed forms returned to the HR Team: [hr@phc.ox.ac.uk](mailto:hr@phc.ox.ac.uk)
- 10) Forms passed to Head of Unit/section (where relevant) and Head of Department (for senior and clinical posts) for information and then returned to the HR Team for filing.
- 11) Requests from reviewee for alternative reviewer(s) will be considered, please contact the PDR Co-ordinator.

## 6. Further guidance and training

Training, guidance documents and resources for both reviewers and reviewees are offered by People and Organisational Development: <https://pod.admin.ox.ac.uk/pdr>

As a minimum, any reviewer who has not done a review at Oxford or who has never had any formal training in conducting reviews, should read POD's PDR for reviewers:

<https://pod.admin.ox.ac.uk/for-reviewers> and undertake the course Managing people: key processes which includes a section on PDRs.

<https://cosy.ox.ac.uk/accessplan/LMSPortal/UI/Page/Courses/book.aspx?courseid=TOLIOMANPE&referrer=coursesearch>

If there is sufficient interest, bespoke courses can also be run in the department. Please contact the HR Team if you would be interested in attending a course in the department.



## **GRADE DESCRIPTIONS**

### **GRADE TEN**

Individuals have a substantial reputation in their field and make a significant impact on the institution and/or their discipline. They commonly have extensive experience with a high level of expertise, exercising substantial independent responsibility and discretion. They regularly work in areas where there is a lack of precedent, requiring innovative thought to develop appropriate solutions which take into account the strategic implications for the institution. They share in the development of policy and strategic plans and/or manage major projects which will have long-lasting effects on significant parts of the institution. They contribute to University-wide decision-making, and may influence (inter)national level policy-making within their own area of expertise. Role holders are typically responsible for a range of activity in a large department, faculty, or division, or for a significant functional area across the institution. They direct large teams and the interaction between them, frame their overall standards and objectives, and manage performance and development.

### **GRADE NINE**

Staff at this grade have a recognised reputation and expertise and are likely to be called upon to provide expert opinion or specialist advice and are likely to contribute to University-wide policy. They typically have management responsibility for setting the goals and managing the resources, performance and development of a team. They have a significant role in strategic planning, play a leading role in networks, and contribute to collaborative decisions which affect a large department, division, or major research project. They lead the investigation and research into complex and sensitive matters, approaching problems from different perspectives to devise an optimal solution.

### **GRADE EIGHT**

Role holders are experienced professionals or have an established research career and exercise a greater level of responsibility than at grade seven. They are most likely to be involved in development work involving input to policy and strategy, or influencing a curriculum or research programme. They have operational responsibility for an area of work or specific aspects of a large project, defining the standards and making decisions within the scope of this work, and have significant input to decision-making affecting the department, division, or research project. They are regularly called upon to present highly technical information, specialist or complex ideas, and/or to write reports and/or material for publication.

## **GRADE SEVEN**

Staff operating at this grade have acquired breadth and depth of expertise in a specific discipline. They may supervise a small operational unit, service, or team, or provide advice, development, and support in a specialist area, or be developing a teaching or research career. They plan and organise concurrent projects and are responsible for managing the links between them and guide the contribution of more junior members of the team. Dealing with others is an important aspect of the work, building relationships and collaborating with others to pursue shared interests. They analyse or research complex issues, concepts, and extensive data from different perspectives, applying existing methodologies and identify the relationships between interdependent factors. They write factual material or reports, and occasionally share in the dissemination of specialist information and complex concepts.

## **GRADE SIX**

The nature of the work at this grade varies considerably, and individuals provide technical or administrative support and advice, or contribute to a research team. They share in collaborative decisions affecting the section or project, propose and implement improvements to current working methods, and are responsible for the quality of a discrete area of work, developing protocols as necessary. They carry out detailed manipulation of data or research and write short reports or factual material. They may contribute sections to more substantial reports and publications. Jobs at this grade require the application of a working knowledge of theory or practice with specific aspects of deeper specialist skills and knowledge. They may also supervise others.

## **GRADE FIVE**

Staff operating at this grade are required to take responsibility for planning their work and tend to plan and manage some short-term projects or co-ordinate activities and events. They are required to adapt and suggest improvements to procedures, which may involve the interpretation of customer requirements, and often contribute to decisions which impact on the work of the section. Day-to-day liaison and networking is carried out to build relationships and facilitate the future exchange of information. Communication with others often requires careful thought as to what to communicate and how best to convey the information. At this grade staff are often required to apply working knowledge of theory and practice to diagnose and resolve technical or procedural issues. Jobs at this grade tend to require staff to demonstrate continuous specialist development.

## **GRADE FOUR**

Staff operating at this grade deal with non-standard work situations more regularly than staff at lower grades and take minor decisions often relating to the interpretation of procedures. They may be required to provide guidance to team members at lower grades, and may also be involved in supervising the work of others. They compose straightforward correspondence and manipulate and present routine data or information for analysis by others. Staff have responsibility for prioritising their work and ensuring the necessary equipment/materials are available. Jobs at this grade require post holders to have some knowledge of professional or technical practice.

## **GRADE THREE**

Staff operating at this grade exercise some personal responsibility and discretion in organising their work within well-defined boundaries. Tasks generally require staff to collate routine data or information for interpretation by others. Staff participate in, and deliver their contribution to, a team and may provide guidance to team members at lower grades. They carry out day-to-day liaison and may participate in networks to pass on information some of which may require careful explanation. Jobs at this grade tend to require some formal training and/or vocational qualifications.

## **GRADE TWO**

Staff operating at this grade have sufficient knowledge to work on day-to-day issues without continuous reference to others. They communicate regularly with others to pass on information, and may be the initial point of contact for enquirers. Staff carry out straightforward tasks to a given plan, which often require gathering information from standard sources or carrying out routine record keeping. The nature of the work requires staff to solve simple problems and take minor decisions relating to the immediate task in hand.

## **GRADE ONE**

Staff operating at this grade carry out prescribed and directed activities according to well-defined procedures. They use basic principles and practices to complete tasks to a given plan with short, defined timescales. Tasks are of a routine nature and require staff to use straightforward communication to establish basic facts regarding the systems and procedures which impact directly on their work. Staff at this grade are given regular and direct supervision and work closely with colleagues whom they can turn to for support.



## Category Descriptions

<b>Grade</b>	<b>Research</b> Roles are focused on research and may also combine elements of teaching, leadership, and management.	<b>Administrative/Professional</b> Central and departmental roles in administrative functions, libraries, and museums.	<b>IT/Technical</b> Technical and IT roles in central and academic departments.	<b>Operational Services</b> Roles concerned with operating and running facilities and providing services.
<b>10</b>	<p>Staff at this grade have a substantial reputation in their field and lead a significant research programme.</p> <p>Tasks may include: leading the development and implementation of research strategy; shaping the strategic direction of major research projects; leading research bids; directing research teams; developing new avenues of research, generating new concepts and methodologies; playing a key role in establishing collaborative (inter)national research initiatives; providing advice to external bodies; contributing to teaching programmes.</p> <p>Roleholders are a leading authority in their subject, demonstrate and maintain research activity of a substantial external reputation, and possess breadth and depth of specialist knowledge in their discipline such as to develop research programmes and methodologies.</p>	<p>Staff at this grade are experienced senior managers, professionals, and specialists responsible for a range of activity in a large department, faculty or division, or for a significant functional area across the institution. Roleholders are frequently called upon to contribute to divisional or institutional projects and activities, for example through membership of working groups or committees.</p> <p>Tasks may include: directing teams of professionals and/or specialists in areas of strategic importance to the University; managing major university-wide projects; developing and delivering strategic plans which have long lasting effects on significant parts of the University; shaping policy for their specific area/discipline and contributing to the University's overall goals and objectives; playing a leading role in external networks and cross-sector initiatives to benefit the institution.</p> <p>Roleholders have an established reputation in their field or specialism within the University, have significant managerial experience, and an awareness of (inter)national policy developments and their likely impact on the institution.</p>		

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<b>9</b>	<p>Staff at this grade have a recognised research reputation and are generally leading a significant research project within an overarching research programme.</p> <p>Tasks may include: generating the research direction; leading research into complex areas, approaching problems from different perspectives and contributing to the overall research strategy; promoting the research area; actively seeking secure research funding; developing new concepts and ideas to extend intellectual understanding; managing a team of researchers; developing networks and links with external contacts/leading thinkers in the research field.</p> <p>Roleholders have a national reputation for their research, a significant publication record, and in-depth understanding of their own specialism to enable the development of new knowledge and understanding within</p>	<p>Staff at this grade are professionals, managers, and specialists with high-level expertise, working with a significant degree of independent responsibility in their functional/specialist area. They are expected to provide expert guidance to colleagues, influence other senior managers, and contribute to university-wide policy.</p> <p>Tasks may include: leading projects which require specialist expertise and have wide-ranging impact; leading the investigation and resolution of complex and sensitive matters; strategic planning and determining the priorities for a department/functional area; providing expert advice to senior managers and committees; having overall responsibility for service delivery; playing a leading role in university committees.</p> <p>Roleholders require relevant academic/professional qualifications and/or formal training, plus significant managerial or in-depth experience in a specialist area, demonstrating professional development in a series of more demanding and influential jobs.</p>		

Grade	Research	Administrative/Professional	IT/Technical	Operational Services
8	<p>Roles are focused on research and may also combine elements of teaching, leadership and management.</p> <p>Staff at this grade will have established a research career and have responsibility for their own area of research, or manage a research support facility.</p> <p>Tasks may include: supervising a team of staff; contributing to research proposals and writing bids for research grants; frequently writing for peer reviewed publications; developing research objectives, projects, and proposals within a discrete area of a wider research programme; assessing and evaluating the outcomes of research; undertaking collaborative projects with researchers in other institutions; monitoring research budgets; supervising PhD students.</p> <p>Roleholders will have a relevant PhD and considerable research experience and achievement reflected by a growing reputation and demonstrated success. They will have recognised and substantial expertise and have developed an in-depth understanding of the theory in their own field of work.</p>	<p>Central and departmental roles in administrative functions, libraries, and museums.</p> <p>Staff at this grade are experienced individuals with recognised professional competence, and are knowledgeable in their own field.</p> <p>Tasks may include: managing the operation of a facility/team of staff; ensuring that agreed policies and business plans are implemented; participating in committees; resource planning and small-scale project management; developing policies; providing expert advice and making recommendations through briefings, presentations and written reports; contributing to business and income development; financial forecasting and modelling; accounting; collections management and development.</p> <p>Roleholders are generally professionally qualified with project and/or people management skills. They require detailed knowledge of the principles, policies, legislation, regulations, and procedures in their field, and generate innovative solutions to problems through the application of specialist know-how.</p>	<p>Technical and IT roles in central and academic departments.</p> <p>Staff at this grade are experienced individuals with recognised professional ability, and are knowledgeable in their own field.</p> <p>Tasks may include: dealing with complex system failures; planning the IT strategy for a department; analysing new developments in IT and how to apply them to the benefit of the department; specialist systems development; managing the operation of a team of staff and/or IT projects.</p> <p>Roleholders require comprehensive knowledge of technological systems and their application coupled with an appreciation of its relevance to their specialist area.</p>	<p>Roles concerned with operating and running facilities and providing services.</p> <p>Staff at this grade manage an operational function.</p> <p>Tasks may include: managing the operation of a significant service with a team of staff; business and resource planning; identifying additional service requirements and shortfalls; facilitating major service, operational or logistical changes; negotiating and managing service contracts.</p> <p>Roleholders are experienced professionals with people management skills. They generate innovative solutions to problems through the application of specialist know-how.</p>

Grade	Research	Administrative/Professional	IT/Technical	Operational Services
7	<p>Roles are focused on research and may also combine elements of teaching, leadership, and management.</p> <p>Staff at this grade are likely to be in the early stages of developing a research career, and to be carrying out specific research activities within an established programme.</p> <p>Tasks may include: day-to-day management of own research and administrative activities; providing guidance to more junior colleagues; contributing to writing bids for research grants; disseminating research findings and writing material for publication;</p> <p>researching complex issues and concepts; analysing extensive data, identifying the relationships between interdependent factors, and drawing conclusions on the outcomes; involvement in the assessment of student knowledge and development of research skills.</p> <p>Roleholders will normally have a PhD, have some relevant research experience, sufficient knowledge of the discipline and of research methods and techniques to work within established research programmes.</p>	<p>Central and departmental roles in administrative functions, libraries, and museums.</p> <p>Staff at this grade manage a small department or function, deputise in a larger department or function, or are professionals working in a specialist area.</p> <p>Tasks may include: managing a small team of staff, planning their work and reviewing performance; servicing and reporting to committees; providing welfare support; managing budgets and inputting to resource planning; personnel management; buildings management; making policy recommendations and drafting reports; gathering and analysing extensive data and information; short-term project management; designing and delivering training courses.</p> <p>Roleholders provide advice and support based on a good understanding of their professional field. They require comprehensive knowledge of relevant policies, regulations, legislation, and codes of practice, plus an appreciation of wider university and HE issues.</p> <p>An academic qualification, e.g. a degree or diploma, and a period of relevant work experience are usually required. Broader sector/commercial awareness may be necessary for</p>	<p>Technical and IT roles in central and academic departments.</p> <p>Staff at this grade manage a small function or are professionals working in a specialist area.</p> <p>Tasks may include: managing a team of staff, planning their work and reviewing performance; overseeing the general maintenance of buildings/plant/equipment; short-term project management; providing specialist technical advice for research activity; managing departmental and/or project IT requirements; contributing to improvements and the development of IT systems on a university-wide basis; analysing user requirements and reviewing provision; systems analysis, development and programming; designing and delivering training courses.</p> <p>Roleholders will have recognised technical ability, and broad knowledge and skills in their area of expertise. An academic qualification, e.g. a degree or diploma, and a period of relevant work experience are required.</p>	<p>Roles concerned with operating and running facilities and providing services.</p> <p>Staff at this grade manage a small operational function, or deputise in a larger function.</p> <p>Tasks may include: managing a team of staff; managing facilities for a small department; coordinating or promoting university security; inputting to resource planning; managing contracts and the quality of service delivery; and marketing.</p> <p>Roleholders require comprehensive knowledge and understanding of relevant work practices, regulations, legislation, and quality standards. For some roles a wider commercial awareness is required.</p> <p>Relevant vocational qualifications and significant experience demonstrating development through a series of progressively more demanding and related jobs are expected.</p>

<b>Grade</b>	<b>Research</b> Roles are focused on research and may also combine elements of teaching, leadership and management.	<b>Administrative/Professional</b> Central and departmental roles in administrative functions, libraries, and museums.	<b>IT/Technical</b> Technical and IT roles in central and academic departments.	<b>Operational Services</b> Roles concerned with operating and running facilities and providing services.
<b>6</b>	<p>Staff at this grade assist a research team to acquire and interpret data and results, where the method and purpose have been defined by the Principal Investigator.</p> <p>Tasks may include: conducting fieldwork or complex experiments; contributing to the development of techniques and protocols; gathering, collating and analysing data; developing questionnaires and conducting surveys; carrying out administrative duties; writing up results of own research; contributing sections to substantial reports and publications; forming relationships for future collaboration.</p> <p>Roleholders are expected to work on their own initiative and resolve issues independently. They will have relevant academic qualifications and a detailed knowledge of the subject area. In some cases staff will be working towards a PhD, and developing further skills in and knowledge of research methods and techniques.</p>	<p>Staff at this grade are responsible for managing a specialist administrative support function, or are at an early stage of a professional career working on associated specialist tasks and administrative projects.</p> <p>Tasks may include: supervising a team of staff; running a private office for a senior manager; managing administrative processes, including contributing to planning for the section, monitoring effectiveness and making improvements; researching, collating, organising, and drafting material for short reports; carrying out detailed analysis and manipulation of data/information; managing budgets and monitoring accounts.</p> <p>Roleholders are expected to work on their own initiative and resolve issues independently. They require detailed knowledge of methods and systems and proficiency in their area.</p>	<p>Staff at this grade are responsible for managing a technical service, or independently providing technical/scientific expertise.</p> <p>Tasks may include: supervising a team of staff; managing technical systems and processes, including planning resources, monitoring effectiveness and making improvements; developing and constructing bespoke equipment; maintaining and updating software, hardware, and servers, and ensuring data security; running experiments, manipulating data and interpreting the results; developing protocols/user guides, and presenting data to others.</p> <p>Roleholders are expected to work on their own initiative and resolve issues independently. They require detailed knowledge of methods and systems and proficiency in their area.</p>	<p>Staff at this grade manage a small operational service, or manage aspects of a broader service provision.</p> <p>Tasks may include: supervising a team of staff; dealing with customers, contractors and suppliers; managing delivery of the service, including planning the resources, managing the budget, monitoring service quality and making improvements.</p> <p>Roleholders are expected to work on their own initiative and resolve issues independently. They require detailed knowledge of methods and systems and proficiency in their area.</p>

Grade	Research	Administrative/Professional Central and departmental roles in administrative functions, libraries, and museums.	IT/Technical Technical and IT roles in central and academic departments.	Operational Services Roles concerned with operating and running facilities and providing services.
5	NA	<p>Staff at this grade provide administrative support covering a range of departmental processes.</p> <p>Tasks may include: overseeing administrative processes; carrying out short-term projects; diary management for a senior manager; collating information and carrying out some initial analysis; organising events and coordinating associated arrangements; managing small budgets; responding to specialist enquiries which require the interpretation of procedures; and drafting procedural manuals/handbooks.</p> <p>Roleholders may be responsible for the day-to-day supervision of staff.</p> <p>Roleholders require comprehensive understanding of relevant systems and procedures and demonstrate continuing professional development.</p>	<p>Staff at this grade draw on in-depth technical skills and knowledge to provide specialist technical support.</p> <p>Tasks may include: carrying out tests and experiments and identifying issues that need addressing; installing and configuring new equipment; diagnosing and resolving IT problems within a specified area; supervising the running of a workshop or laboratory; carrying out remedial and preventative conservation work, and constructing specialist conservation packaging for library materials.</p> <p>Roleholders may be responsible for the day-to-day supervision of staff.</p> <p>Roleholders require comprehensive understanding of scientific/technical procedures or IT systems, and demonstrate continuing professional development.</p>	<p>Staff at this grade will be either highly skilled in their specialism or have formal responsibility for managing a small operational service, for example a shop.</p> <p>Specialist tasks may include: joinery; French polishing; carpentry; and the preparation of fine food.</p> <p>Other tasks may include: resolution of operational problems; managing a small number of staff; managing a small budget; buying; and merchandising.</p> <p>Roleholders interpret customer requirements in order to tailor a service to meet them.</p> <p>Roleholders require comprehensive understanding of relevant regulations and procedures.</p>

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4	NA	<p>Staff at this grade work with minimum supervision to carry out more varied or specialised administrative work.</p> <p>Tasks may include: dealing with straightforward correspondence; chasing outstanding debts; creating documents and presentations for others; organising small events and activities; writing new straightforward office procedures; gathering, manipulating, and presenting data for payroll purposes; drafting agendas and minutes of meetings; foreign cataloguing; and answering specialist reader enquiries.</p> <p>Roleholders may assign tasks to others and require the ability to organise resources and prioritise activities within a general schedule.</p> <p>Jobs at this grade require some knowledge of professional practice and a detailed understanding of relevant systems and procedures.</p>	<p>Staff at this grade work with minimum supervision to carry out more varied or specialised technical activities.</p> <p>Tasks may include: carrying out straightforward tests and experiments; performing calculations and presenting results accurately; using, monitoring, and maintaining specialist/IT equipment; solving straightforward software or hardware problems; re-setting user accounts; setting up work stations; diagnosing and rectifying electrical faults; providing straightforward demonstrations of experiments.</p> <p>Jobs at this grade require post holders to have working knowledge of scientific/technical best practice.</p> <p>A higher certificate , diploma, or a comparable qualification OR substantial relevant experience and appropriate licences and certificates are required. In addition role holders will have well developed understanding of health and safety regulations and procedures.</p>	<p>Staff at this grade will be either skilled in their specialism or have formal supervisory responsibility for a team of staff.</p> <p>Specialist tasks may include: skilled horticulture and arboriculture; the implementation of landscape plans; plumbing; painting and decorating; and woodworking.</p> <p>Other tasks may include: coordinating responses to incidents; safekeeping master keys to university buildings; maintaining plant equipment; allocating tasks; cashing-up; and compiling rotas.</p> <p>Roleholders use initiative to provide an agreed level of customer service, and make suggestions to improve the service, taking customer feedback into account.</p> <p>A higher certificate, diploma, or a comparable qualification OR substantial relevant experience and appropriate licences and certificates are required. In addition role holders will have well developed understanding of health and safety</p>

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3	NA	<p>Staff at this grade carry out a range of clerical or administrative tasks, which often require a greater level of attention to detail.</p> <p>Tasks may include: maintaining information on databases; running standard reports; assisting in the organisation of events; making travel arrangements; setting up meetings; taking minutes at team meetings; copy cataloguing; regularly dealing with reader enquiries and offering advice.</p> <p>Roleholders follow standard office procedures, for example for processing payments and ordering stock, and carry out day-to-day liaison with established contacts and suppliers.</p> <p>Jobs at this grade tend to require some formal training and/or vocational qualifications, knowledge of relevant systems, processes, policies, and procedures, and an awareness of how to handle confidential information.</p>	<p>Staff at this grade carry out a range of technical activities within an agreed specification.</p> <p>Tasks may include: carrying out simple repairs to technical equipment; cleaning and boxing library materials; preparing slides; setting up experiments; preparing samples; recording and collating routine data; issuing apparatus; and testing electrical equipment.</p> <p>Roleholders use standard as well as some more specialised equipment and require an appreciation of the basic principles of the relevant scientific/technical discipline.</p>	<p>Staff at this grade exercise some personal responsibility in the delivery of a practical support service.</p> <p>Tasks may include: preparing menus and a variety of food; planting; turf culture; applying herbicides and fertilizers; maintaining grounds, pitches, and all weather surfaces; conducting gym inductions; and life guarding.</p> <p>Roleholders are required to plan so that equipment is available to carry out specified tasks, and the role may involve supervising and guiding less experienced colleagues.</p> <p>Jobs at this grade tend to require some formal training and/or qualifications.</p>



Grade	Research	Administrative/Professional Central and departmental roles in administrative functions, libraries, and museums.	IT/Technical Technical and IT roles in central and academic departments.	Operational Services Roles concerned with operating and running facilities and providing services.
2	NA	<p>Staff at this grade follow a general daily routine to carry out clerical tasks, which require some previous experience.</p> <p>Tasks may include: typing; data entry; routine record keeping; database searches; receiving visitors; answering the telephone; responding to general enquiries; processing invoices; and issuing books.</p> <p>Roleholders require sufficient experience to work on day-to-day issues without continuous reference to others, and should have knowledge of standard office software packages.</p>	<p>Staff at this grade <b>either</b> work in a hazardous environment and carry out the tasks described in grade one <b>OR</b>: follow a general daily routine to carry out a number of technical activities.</p> <p>Tasks may include: operating and cleaning duplicating equipment; testing and carrying out basic maintenance on technical equipment; and simple solution preparation.</p> <p>Roleholders need to have sufficient experience to work on day-to-day issues without continuous reference to others, and require some certification, short courses, and/or practical training.</p>	<p>Staff at this grade deliver customer services to an agreed standard of quality.</p> <p>Tasks may include: receiving visitors; setting up displays and equipment; handling small amounts of cash; ordering routine stock; monitoring CCTV; patrolling university premises; and driving.</p> <p>Roleholders tend to be the first point of contact for customers, answering general enquiries.</p> <p>Roleholders need to have sufficient experience to work on day-to-day issues without continuous reference to others, and require some certification, short courses, and/or practical training. A full driving licence may be required for some roles.</p>

Grade	Research	<b>Administrative/Professional</b> Central and departmental roles in administrative functions, libraries, and museums.	<b>IT/Technical</b> Technical and IT roles in central and academic departments.	<b>Operational Services</b> Roles concerned with operating and running facilities and providing services.
1	NA	<p>Staff at this grade carry out defined clerical tasks in order to contribute to the day-to-day operation of a department.</p> <p>Tasks may include: filing; sorting mail; photocopying; and relaying messages; responding to straightforward requests for information.</p> <p>Roleholders require basic numeracy and literacy, and the ability to work accurately. Knowledge of procedures and processes is gained on the job.</p>	<p>Staff at this grade provide routine technical support and carry out defined practical/operational tasks under instruction.</p> <p>Tasks may include: glasswashing; preparation of simple solutions; general cleaning and tidying; and taking care of basic apparatus and equipment.</p> <p>No specific qualifications or experience are required prior to appointment, and equipment used will require the minimum of instruction for safe operation.</p> <p>This grade can be used as an entry-level grade for employees undertaking a training course leading to a qualification, and it is expected that staff would undertake a relevant day-release course at an appropriate training college.</p> <p>For those under training, complexity of task, personal responsibility, and the range of equipment used will increase according to experience and development.</p>	<p>Staff at his grade deliver a well-defined customer service, which may involve cleaning, catering, invigilation, gardening, or portering.</p> <p>Tasks tend to be practical and may include: replenishing vending machines; washing up; serving meals; reporting basic maintenance faults; moving furniture; controlling access to buildings; mowing; and hedge trimming.</p> <p>Roleholders may provide routine assistance to staff, students, and visitors; and respond to straightforward requests for information.</p> <p>No specific qualifications or experience are required prior to appointment, and equipment used will require the minimum of instruction for safe operation.</p> <p>This grade can be used as an entry-level grade for employees undertaking a training course leading to a qualification, and it is expected that staff would undertake a relevant day-release course at an appropriate training college.</p> <p>For those under training, complexity of task, personal responsibility, and the range of equipment used will increase according to experience and development.</p>