Technician Commitment: Stage Two Self-Assessment & Action Plan Guidance

Please note: This guidance and template is for institutions who have already submitted their Stage One Self-Assessment & Action Plan, 12-13 months after becoming an official signatory of the Technician Commitment. This guidance and template refers to the second stage of self-assessment and action planning to be submitted 2 years after the submission of the original submission.

The Technician Commitment aims to ensure visibility, recognition, career development and sustainability for technicians working in higher education and research, across all disciplines.

The second stage of self-assessment and action planning process asks for reflection on past action plans, progress, and engagement and a further 36-month action plan. The self-assessment includes a 'RAG' analysis of previous action plans - a 'Red, Amber & Green' status report.

The Technician Commitment Steering Board does not seek to dictate how organisations promote a positive culture for the technician community. This is a matter for autonomous institutions and the technician, research and academic community to agree. It is expected that as a minimum, signatories publicly state their Technician Commitment signatory status and institutional action plans on a dedicated and discoverable webpage, along with their named point of contact. The Steering Board asks signatories to evidence that the 'technician voice' is present in the development and formation of institutional action plans. The Technician Commitment is a collaborative endeavour and the Steering Board will support and facilitate the establishment and sharing of best practice demonstrated in the self-assessments and action plans. A vibrant community of Institutional Leads tasked with implementing the Technician Commitment has developed since the Commitment's inception and the Steering Board aims to ensure a range of forums are available to enable peers to share expertise, good practice and experiences.

To continue to support institutional action planning, please see Appendix A for examples of activities and initiatives that have been successfully implemented in a range of universities and research institutes. Additional details are available on the Technician Commitment's dedicated online resource, available at http://technicians.org.uk/techniciancommitment/. Cross referencing to other sector institutional reviews relevant to technicians is welcomed; for example, the Steering Board are keen to learn how signatories are advancing equality, diversity and inclusion for the technical community and institutions may wish to reference Athena SWAN and Race Equality Charter submissions. The Steering Board are also keen to learn of Teaching Excellence Framework (TEF) submissions and Research Excellence Framework (REF) environment statements where technicians have been explicitly mentioned.

Please note that finalised Action Plans should be signed off at an institutional leadership level (e.g. Vice-Chancellor/President/Director level).

For any additional queries, please contact k.vere@sciencecouncil.org

Please note that finalised 3-year Action Plans should be signed off at an institutional leadership level (e.g. Vice-Chancellor/President/Director level).

Evaluating Impact through Self-Assessment & Future Action Planning

Organisation: University of Bristol

Name of Institutional Lead: Fred Hale

E-mail: fred.hale@bristol.ac.uk

Contact Number: 07876662238

Overview of technical staff structures

Faculty based Technical Staff are one of the largest groups of professional services staff in the University. These critical staff and the facilities they support directly enable our practical teaching and research activities to function, interacting directly with students and academic staff at all levels. This is a diverse staff group working in multiple disciplines and at a range of skill levels.

Currently there are c.430 Faculty based Technical Staff covered by this strategy which is more than 1 in every 17 people who work at Bristol University.

Technical Staff split as of Oct 2019 (430)
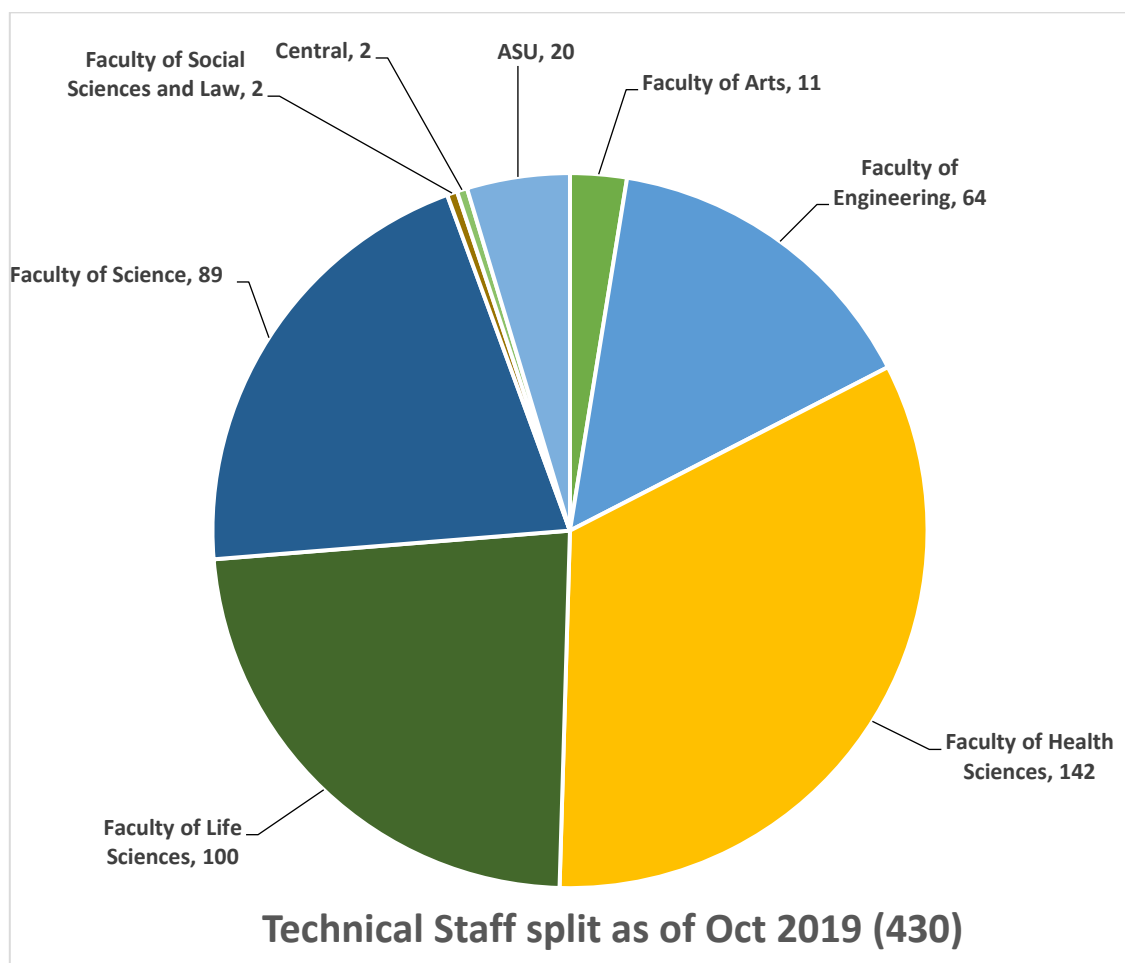
Unlike in our support service (Divisions) our Technical Staff are School/Centre/Service and Faculty based. Each Faculty determines the level of Technical Provision necessary to meet its Teaching and Research support needs, through the normal planning processes.

As is common across the sector, technical staff and services are funded from either core budgets or research grants (DI and DA) or a combination of these sources. Whilst the majority are core funded c.33% of Technical Staff are currently fully or partly externally funded.

Our Technical Staff are geographically spread over many sites in Bristol (including at various Hospital locations) as well as at our Campus at Langford in Somerset.

At Bristol we have implemented a standard Technical Career Framework, replacing a myriad of individual, inconsistent and outdated job descriptions with a single suite of job evaluated, flexible/generic job roles, mapped to the business need and aligned with professional registration.
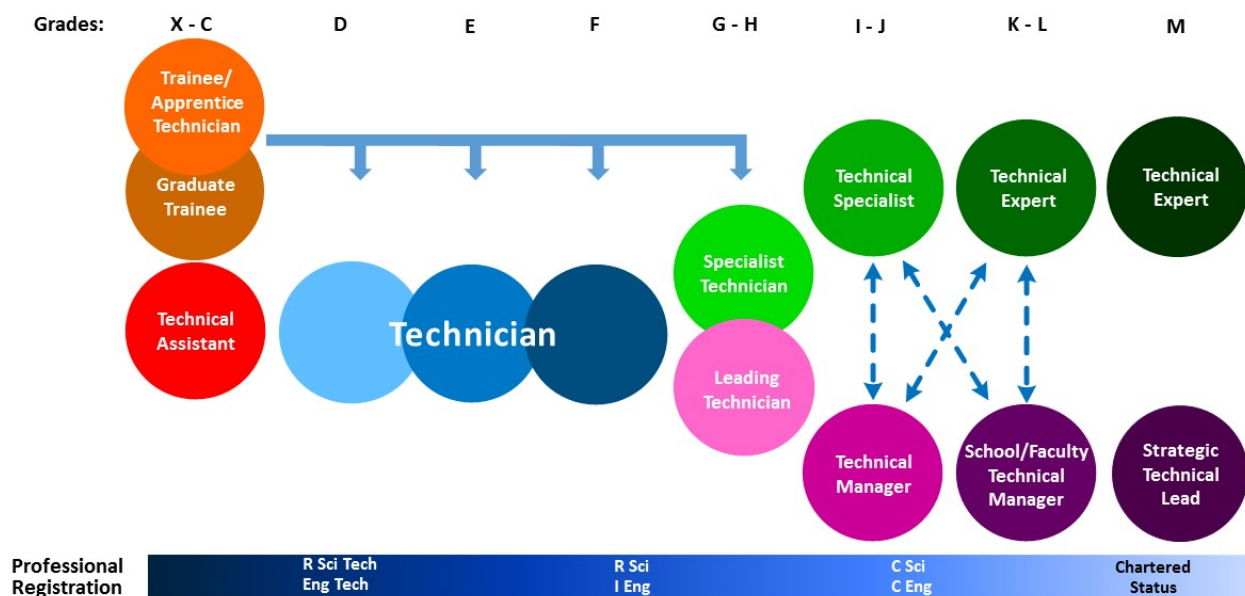
Fig. 2 The Bristol Technical Career Framework

Our Technicians generally report into School and/or Faculty Managers, through an appropriate level of Technical Management. The differences in scale and complexity of technical support across our faculties and schools generally align to one of three generic reporting models. These models and a suite of roles descriptors have been developed as part of our overall Technical Career Framework.

Our grant funded Technical Staff often have an academic line manager for primary line management and day-to-day tasking, as well as an associate Technical Manager for professional and career management.

Currently there is a Strategic Technical Lead who works across the institution as a technical process owner and as an internal and external point of contact , to represent the whole technical community and to provide leadership for our institutional Technical strategy, act as the Institutional Lead for our

Technician Commitment to co-ordinate related collaborative activities. The institution is aiming to implement an updated technical strategy that will allow us to embed the activities of the Strategic Technical Lead into business as usual.

University of Bristol's approach to the Technician Commitment since becoming a signatory

As outlined in our original submission, Bristol was already taking actions that would later underpin our Technician Commitment.

Prior to declaring and signing the Technician Commitment Bristol had developed a university wide Technical Strategy. The pillars of the strategy are:

- Leadership
- People
- Faculties and Resources

A further activity resulting from the Technical Strategy was the creation of a new Technical Career Framework working group with a remit to develop a new career framework covering all teaching and research focussed technical roles at the University.

We had established a Technical Managers group that was formed to:

- lobby for support and recognition
- develop, articulate, and share good practice
- act as a conduit for communications to the wider technical staff body
- solve common issues
- engage with sector and UK policy representative groups and initiatives
- act as a focal point for relevant university projects and activities
- promote skills development for staff
- establish new technical apprenticeships
- establish an annual all Technical Staff conference

Since becoming a signatory we have been implementing actions aligned to the Commitment including:

Visibility actions:
- Appointment of a University wide Strategic Technical Lead (STL) – the STL acts a clearer focus for 2-way communications (and influence) into university planning, actions, and initiatives.   The STL engages at all levels in the organisation, from individual interactions, technical teams, larger teams, Faculty Managers, the Divisions and with University Senior Management
- The Technical Strategy implementation has resulted in greater technical representation on relevant decision-making groups and on projects
- Technical staff are engaged in EDI actions, from leaders working on EDI strategy (i.e. Athena Swan plans), to presenting the Bristol good practice approach at the Technical Managers Conference as well as running local fora and workshops including at our Technical Staff conferences.
- The University has established a Technical Leaders Group with greater representation reflecting our diverse technical community. These Technical Leaders are more proactive and

much more identifiable as key stakeholders in change and improvement activities as well as in influential working groups

- Celebrating Technical Careers through case study videos produced with/by our apprentices, to raise the profile and inspire others to pursue technical careers. These videos are used for careers activities, provided to schools, colleges, and community groups; as well as shared via web and social media channels
- Participation in 'new staff welcome fair' induction events (for all new staff at Bristol)
- Creation and publication of a 'Technical Matters' newsletter, that goes to all technical staff and Faculty Managers
- Bristol encourages active participation across the wider technical community. We currently work with HEaTED both in providing the chair for the SW regional network and in delivering Executive Technical Leadership Training nationally, we contribute to the GW4 (regional HEI alliance) Technical Infrastructure and Knowledge Working Group, participate in conferences and events such as HETS, TMU, IST and Technician Commitment signatory events

Recognition actions:
- The university recognises the contribution and achievement of technical staff alongside other professional services staff in our staff excellence awards
- The university are recognised as 'Employer Champions' by the Science council – we have a growing number of technical staff who have or are seeking professionally registered Recognition and we continue to promote and support professional registration to staff through our career framework, with support from our staff development team and in supporting initiatives such as our GW4 (regional alliance) support programme
- We have included professional recognition as 'desirable' in the SKE section on all new technical job roles
- Technical staff at all levels are increasingly engaged with in decision making in faculties, schools, and the professional services divisions. We are making progress with associate management for grant funded technical staff and in supporting regarding careers and succession for all
- Technical expertise is being recognised, new generic roles have been created to provide technical specialist/expert career pathways should the business need require these, within the technical job family
- CREATE – our framework for teaching excellence previously only available to academic teaching staff was piloted with a cohort of technical staff (who carry out the requisite amount of teaching). This will result in HEA (professional) accreditation as well as recognising teaching competence in those who successfully complete the programme

Career Development actions:
- Bristol is a pioneer in establishing a clear and consistent career framework with technical roles identified at all levels in the organisational structure. All new technical roles are aligned to our technical career framework, and all new roles are approved by a relevant technical leader. This framework has been shared and adopted/adapted by many HEIs as far away as Australia
- Our technical career framework identifies pathways to technical specialist/experts as well as for technical managers and leaders
- Our technical career pathways clarify and identify the role types to inform individual career planning

- We continue to run needs driven technical leader training and development activities on a range of topics; to equip our technical leaders in managing and developing our teams effectively

Sustainability actions:
- We have delivered some focussed training on people and skills resource planning and on building effective business cases for technical; linked to local/organisational plans and objectives
- We have started engaging with the local community to raise the awareness of technical careers at Bristol, including Apprenticeships (apprenticeships at Bristol videos)
- We have initiated some work to ensure the University Planning Processes fully embed Technical Support planning
- We provide central support, advice, and guidance for Technical Apprenticeships throughout the process, from assessing the need through to selection and recruitment, training of local supervisors, induction, completion, celebration, and final placement or exit support
- We are identifying potential future leaders in the technical family and providing opportunities to develop (e.g. Organising Technical Conferences, working on best practice guides with other stakeholders, mentoring, outreach)
- We are developing good practice guides, tools and processes for reporting and analysis of technical job family demographics to support succession planning and recruitment
- We are developing a good practice guide to developing staff, including personal career planning, secondments, professional registration, CPD and technical skills development, placements, projects, and continuous improvement activities
- We are supporting the national work around HE Apprenticeship HE Trailblazer Consortium and specific HE technician apprentice standards

Evaluating Impact actions:
- We are currently reviewing out overall Technical Staff and Services Strategy against the achievement of the original recommendations, as well as reviewing the effectiveness of the strategy overall. A revised new updated strategy will be presented to the University Management Team in 2020
- We are reviewing all the new Technical Career Framework job roles through a 'light touch' review process to ensure compliance and review effectiveness
- We are reviewing the Professional Registration process with our pilot cohort
- We are reviewing our technical teaching CREATE programme with our pilot cohort
- We were able to see significant positive shifts in the responses from technical staff to our last full staff survey (2018).
- We regularly review technical strategy implementation with the University Faculty Managers Group
- The Strategic Technical Leaders Group regularly review the effectiveness and implementation of the overall technical strategy
- The Technical Leaders Group regularly review and feedback on local technical strategy implementation
- The Registrar and University Secretary regularly meet to review the implementation and effectiveness of the strategy
- The STL meets as required with the Chief People Officer and with the Director of People and Organisational Development regarding the people processes and the technical staff community

A RAG analysis on our previous institutional 24-month action plan is included as Appendix A to this document

How do we know how we are doing?

As detailed in the previous section we are constantly evaluating the impact of our technical strategy and seeking evidence.

Staff Survey

The recent **staff satisfaction survey** has provided clear evidence of a shift in how technical staff feel, indicating broad positive responses around:

- Immediate Manage - keeps me informed & provides support
- Working Life - we have what we need to do the job and can manage our work
- Wellbeing - we feel supported and able to cope with our work
- Culture - the University cares about us

In many areas technical staff responses indicated that this group had moved from the 'least satisfied' to the 'most satisfied' form the previous surveys, when compared to the wider professional services responses. The STL and Technical Leaders reviewed these results in a series of presentations and meetings with technical staff, from which new actions were developed. The primary area of dissatisfaction was evident around careers and progression, which has resulted in positive actions around the career framework, professional registration, line manager training, staff career development training and greater staff flexibility and engagement in stretching work tasks.

Our Staff profiles

As part of our original strategy we analysed the Technical staff population data in a variety of ways including gender, age profiles and job grades. We can clearly see evidence of positive action where issues were identified, for example a clear positive impact of recruiting more females into one of our Faculty technical teams, at all levels.

Generic Job Roles

We can also clearly see evidence of more consistent job grades and roles across the organisation, due to the role out of the Technical Career Framework (generic+ job roles). This has also had a positive impact in reducing the number of job evaluation panels. Whilst not easily measured, we will have also achieved a significant reduction in effort by recruiting managers and Human Resources staff in drafting and submitting new job descriptions.

Effective engagement in planning

We can also see clear evidence of greater relevant technical representation in:

- School/Service/Faculty planning and management activities
- New major projects (such as the new Temple Quarter Campus development)
- Senior management groups such as our University Management Team plenary sessions
- Engagement of technical representatives in the current COVID-19 business continuity response

Additional activities, not previously covered but aligned to our Technician Commitment action plan

Our institutional drive for achievement of the environmental standard LEAF (Laboratory Environmental Assessment Framework) for all of our labs has been made possible by our overall approach to a connected technical community and having a clear route for institutional approaches underpinned by our technical strategy and commitment. People know who to contact now, and we are empowered as a technical community to develop institution wide positive actions that meet the objectives of the institution and of the Faculties.

Other examples include our work on Diversity and Inclusivity and our work on Student and Staff Mental Health and Wellbeing where we have been able to take positive action as a technical community to the benefit of our separate business units.
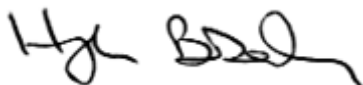
A 3 Year action plan is included as Appendix B to this document

Our Technician Commitment status and 3-Year plan is published on our website here: https://www.bristol.ac.uk/staffdevelopment/professional-services/technical-staff/technician-commitment/

Signed…………………………………………(Technician Commitment Nominated Institutional Lead)

Date: 11th June 2020

Signed…… ..(Technician Commitment Signatory – Leader of Institution)

Date: 11th June 2020

Appendix A - RAG Chart of existing 24 month action plans

Theme	Example Activities (24-month action plan)	Red	Amber	Green	Red narrative
Visibility Ensure that technicians within the organisation are identifiable and that the contribution of technicians is visible within and beyond the institution	• The Institutional Strategic Technical Lead provides a clear point of access and representation in university planning and decision making where technical considerations need to be made			Green	
	• Maintain our database of all staff in our technical job family; ensuring all technical job family staff have clear and appropriate line management (whether professional services or academic; and all technical staff have a direct or clearly identified associate technical manager			Green	
	• Ensuring all of our technical leaders are identified and included in technical planning and communications activities at the appropriate level of responsibility		Amber		
	• Supporting and Enabling Technical Staff outreach, volunteering and community engagement activities		Amber		
	• All new technical staff roles will use the clearly identifiable and consistent generic+ job descriptions and job titles provided and maintained as part of our Technical Career Framework			Green	
	• All staff in the technical job family are invited to the annual technical staff conference			Green	
	• All staff in the technical job family are invited to participate in training and development focussed on technical staff needs			Green	
	• Develop and implement actions to ensure technical staff are identified and appropriately provisioned for on grants and in other existing and new activities where technical support is needed		Amber		
	• Develop the Technical Staff web portal		Amber		
	• Develop internal marketing and public engagement materials such as our Technical apprenticeship videos		Amber		
	• Continue to develop out 'Technical Matters' electronic newsletter, which included celebrating technical staff/team successes			Green	
	• Ensure and maintain representation at Senior Management, Faculty, School/Service level as well as on major projects, as described in our Technical Strategy (approved recommendations)			Green	
	• Continue to include technical staff in the Professional Services excellence awards and to have specific awards for technicians and technical teams		Amber		
	• Ensure the Technical Strategy is reflected in the overall organisation strategy		Amber		
	• Maintain and further develop our technical leaders group			Green	
Recognition Support technicians to gain recognition through professional registration	• Organisation communicates the opportunity to become professionally registered to technical staff. We will share the experiences of our pilot technical staff group			Green	
	• Conferment of the organisational level Science Council Employer Champion award in recognition of the support given to technical staff to gain professional registration and engage in continued professional development			Green	
	• Evaluate and review the effectiveness and suitability of our teaching excellence programme (CREATE) with our pilot cohort of technical teaching staff and the CREATE programme team. This programme is Higher Education Academy accredited		Amber		
	• Continue to include technical staff in the Professional Services excellence awards and to have specific awards for technicians and technical teams		Amber		
	• Develop protocols for consistently recognising appropriate technical staff contributions in published research outputs		Amber		
Career Development Enable career progression opportunities for technicians through the provision of clear, documented career pathways	• Bristol is a pioneer in establishing a clear and consistent career framework with technical roles identified at all levels in the organisational structure. All new technical roles are aligned to our technical career framework, and all new roles are approved by a relevant technical leader			Green	
	• Our technical career framework identifies pathways to technical specialist/experts as well as for technical managers and leaders			Green	
	• Our technical career pathways clarify and identify the role types to inform individual career planning			Green	
	• Our technical career framework is aligned to professional recognition			Green	
	• Out dedicated technical web pages provide a range of career and development resources			Green	
Sustainability Ensure the future sustainability of technical skills across the organisation and that technical expertise is fully utilised	• Initiation of a 'shared facilities' working group to look at defining good practice in the support and access to shared research and teaching facilities, including the manged costing and funding of appropriate technical support			Green	
	• Resource Planning and Business Case skills for technical managers and leaders to support appropriate levels of technical support, linked to organisational plans and objectives			Green	
	• Engagement with the local community to raise the awareness of technical careers at Bristol, including Apprenticeships		Amber		
	• Working with the University Planning Processes to fully embed Technical Support planning		Amber		
	• Central support, advice and guidance for Technical Apprenticeships throughout the process, from assessing the need through to selection and recruitment, training of local supervisors, induction, completion, celebration and final placement or exit support			Green	
	• Identification of these with leadership potential in the technical family and providing opportunities to develop (e.g. Organising Technical Conferences, working on best practice guides with other stakeholders, mentoring, outreach)		Amber		
	• Develop good practice guide, tools and processes for reporting and analysis of technical job family demographics to support succession planning and recruitment	Red			we have changed our personnel information systems during this period and are yet able to develop a suite of bespoke reporting for the technical staff group from the new system
	• Develop the technical good practice guide to developing staff, including personal career planning, secondments, professional registration, CPD and technical skills development, placements, projects, and continuous improvement activities	Red			much of this inpofrmation exists and is current and will now reside and be accessible through the new information system tools such as sharepoint and on the developing intranet rather than in a single guide
	• Continue supporting the national work around HE Apprenticeship HE Trailblazer Consortium and specific HE technician apprentice standards			Green	
	• Promote and communicate technical career opportunities to graduates, post-graduates and academics as a career choice		Amber		

Technician Commitment

Appendix B - 3 Year Action Plan 2020/23

Actions	2020/21				2021/22				2022/23			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
VISIBILITY												
The approval and implementation of a updated 3 year institutional Technical Strategy												
Continue to operate the Strategic Technical Leaders Group												
New set of case studies celebrating technical careers/apprenticeships												
Continue to support all staff inductions through the staff welcome fairs												
Creation and publication of a 'Technical Matters' newsletter, that goes to all technical staff and Faculty Managers												
Contune to run the annual Technal Staff Conference												
Manitain our institution wide Technical Leaders Community through meetings, networking, projects, training/development and direct communications												
Develop the new Institution wide 'Technical Staff and Services' Sharepoint site												
Continue to support local community careers events												
RECOGNITION												
Contine to recognise Technical Staff at our Professional Services Staff Excellence Awards												
Meet our obligations as 'Employer Champions' with the Science Council by continuing to encourage and support professional registration for Technical Staff												
We will continue to include professional recognition as 'desirable' in the SKE section on all new technical job roles												
Technical staff will continue to be enageged in decision making in Faculties, Schools and the Divisions												
Technical Expertise is recognised in our career framework and with specific technical specialist/expert career job roles defined and avaailable												
We will continue to seek ways to recognise technical teaching excellence and promote HEA (professional) accreditation												
CAREER DEVELOPMENT												
Maintain our career framework with technical roles identified at all levels in the organisational structure - this framework will be refined and maintained												
Our technical career framework will continue to support a mix of career progression pathways for technical specialist/experts as well as for technical managers and leaders												
Our technical career framework will continue to help clarify and identify the role types to inform individual career planning												
Continue to run needs driven technical leader training and development activities on a range of topics; to equip our technical leaders in managing and developing our teams effectively												
Contunue to provide career development and professional registration workshops and support												
Contiue to provide a mix of technical staff focuassed training provision as well as opportunities for learning with other staff groups												
SUSTAINABILITY												
Continue to provide focussed training and development opportunities around people and skills resource planning and on building effective business cases												
Continue to enage with the local community to raise the awareness of technical careers at Bristol, including Apprenticeships (apprenticeships at Bristol videos)												
Continue to embed technical resource planning into the University Integrated Planning Processes												
Continue to provide central support, advice, and guidance for Technical Apprenticeships												
Continue to identify potential future leaders in the technical family and providing opportunities to develop												
Continure to develop resources, tools and processes for reporting and analysis of technical job family demographics to support succession planning and recruitment												
Continue to support the national work around HE Apprenticeship HE Trailblazer Consortium and specific HE technician apprentice standards												
EVALUATING IMPACT												
The review the implementation of a updated 3 year institutional Technical Strategy												
Continue to monitor and review the Technical Career Framework job roles through a 'light touch' review process to ensure compliance and review effectiveness												
Monitor and respond to the feedaclck of technical staff in our full staff surveys												
Continue to review technical strategy implementation with the University Faculty Managers Group												
The Strategic Technical Leaders Group will continue to minotor and review the operational implemenatation of the technical strategy												
The Technical Leaders Group will continue to feedback on the local implemenatation of the technical strategy												
The Registrar and University Secretary engages with technical leads/representatives to review the implementation and effectiveness of the strategy												
The Chief People Officer and with the Director of People and Organisational Development engages with technical leads/representatives to review the implementation and effectiveness of the strategy												