



UNIVERSITY OF  
LIVERPOOL



# CREATING A RESEARCH TECHNICAL PROFESSIONAL CAREER PATHWAY

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# A Guide to Creating a Research Technical Professional Career Pathway

## Why embark on this work?

High skilled, specialist research and technology colleagues represent an essential feature of the university research and teaching landscape. They facilitate the Team Science agenda and provide the expertise required for delivering and accelerating high level research and teaching solutions. They have typically undergone years of formal and vocational training to achieve their level of expertise and specialism. They can be hard to recruit, meaning that universities often invest further in their development to allow them to grow into more senior or expert roles. Loss of these staff can have disproportionate and prolonged impacts in the capability and delivery of strategic research areas, technologies and/or support systems.

Traditionally these colleagues are seemingly randomly distributed between Technical, Managerial (inc senior administration), Academic Research Only pathways. The grade criteria within these pathways frequently do not accurately reflect the roles performed by specialist desk- and lab-based research staff. For example, the managerial pathway increasingly focusses on management hierarchies rather than research contributions and impact. Similarly, there are typically technologists who underpin critical teaching and education activities but may struggle to satisfy pedagogy and scholarship expectations within a Teaching & Scholarship pathway. The lack of an appropriate pathway can impact progression opportunities and result in colleagues feeling undervalued and inadequately recognised by the institution. This is compounded by most current pathways requiring promotion via vacancies rather than the type of progressive development necessary for specialist research and technology colleagues.

This results in attrition of highly trained individuals.

In the University of Liverpool there was no Grade 10 (our most senior grade and equivalent to a Professor role) progression criteria available to retain or recruit internationally recognised leaders in these specialist roles.

Within the sector these issues are recognised and addressed with varying levels of success. The Experimental Officer Pathway is a commonly available route within government and other higher education institutions for lab-aligned specialist research roles. Some Universities have refined their role indicators but limited them to technician and technology-focussed roles.

Funding agencies are refining their policies in this area. Aligned to the Technician's Commitment, UKRI expects universities and research councils to appropriately recognise and value specialist research technicians and support staff. Compliance with the Technician's Commitment and the evolving expectations of major external funders requires that we establish a clear career structure with suitable recognition and reward frameworks for these colleagues.



### Key Consideration:

Find a sponsor from your Senior Leadership Team, one who is already committed to the Technician Commitment and has an understanding of the issue.

## KEY FACTORS TO SUCCESS

1

**Get senior management buy-in at an early stage, without which you will find it difficult to implement, this needs to be led and endorsed from the top.**

2

**Clearly articulate the imperative / demand and the scope of what is being delivered.**

3

**Do not under estimate the level of impact and the level of change that this will have, This is a long term commitment, not a one-off exercise to implement and "tick off as complete".**

**For the University of Liverpool this meant the Senior Leadership Team endorsing this project and the demand being led by the faculties. This was a university driven project, recognised across all faculties for its strategic importance supported by Human Resources and the Leadership, Organisational, Professional and Academic Development Academy.**

# Working Out The Scope

This pathway is available to any colleague employed in specialist research or technology roles commensurate with the Grade 6-Grade 10 indicators, including colleagues on fixed term funding. Specialist Grade 5 colleagues were initially out of scope but have now been included in the second cycle of applications.

A deliberate decision was made that this pathway would be inclusive and applications from colleagues on all existing career pathways could apply. This was due to the diverse nature of the roles across the university and if the pathway had been too prescriptive in its eligibility, there was a risk

that colleagues that could be considered may have been excluded.

In the first cycle colleagues applied from Technical, Professional Managerial and Specialist Administration (PMSA) and Academic Research only areas. Their application to join the pathway was considered against the indicators developed and not based on their existing pathway.



## THE FOLLOWING CONSIDERATIONS WERE MADE

- There was to be no quota allocated.
- The introduction of a Research and Technical Professional Career Pathway supported the deliverables under all four themes: Visibility, Recognition, Career Development, and Sustainability included in the University of Liverpool's Technician's Commitment action plan.
- Transfer of current staff to the alternative pathway was on a voluntary basis (for the University of Liverpool there are pension considerations as we operate more than one pension scheme).
- Scope was initially restricted to Grade 6-Grade 10. Once we had the learning from the first cohort it would be opened up to Grade 5.
- There was no intention to review or revise current contractual terms and conditions for the existing career pathways or to introduce new contractual terms for this additional pathway.
- There was no direct financial (revenue or capital) impact from the introduction of an additional career pathway other than any future promotion cases that are agreed, e.g. new roles are not created via this pathway.
- This career pathway would not create an alternative route to HERA role evaluation.

### Equality, diversity, and inclusion considerations.

It is important that any changes you introduce do not negatively impact equality, diversity, or inclusion. Colleagues need to be able to understand whether the career pathway is relevant to them; however, UKRI highlighted how the terminology used can result in some staff feeling excluded. For example, research engineers would not necessarily identify with the term technologist. Consequently, UKRI have avoided imposing a generic research specialist job family title across all their funding agencies and research centres. Colleagues that would benefit from the alternative career pathway should be engaged in the process to ensure that they do not perceive the role titles as exclusionary.

To note, BBSRC, MRC and EPSRC are using the title Research and Technical Professional for this group of staff and UKRI have set up an RTP working group to address issues across the sector. Alignment with this UKRI terminology will support wider recognition and networking.

Creating a new pathway will provide the opportunity for harmonisation and parity. It will also be important to try to ensure fluidity of routes in and out to accommodate changing career priorities.



#### Key Consideration:

Bring together a university wide working group that includes academic, professional services and colleagues that could be considered part of a future pathway.



#### Key Consideration:

Develop a clear imperative, that links to strategic and operational objectives, for Liverpool it was, Recruitment, Retention and Recognition.

# Creating Structure and Indicators

For each grade, a set of [essential and desirable indicators](#) were designed. These capture the increasing expectations around management and leadership contributions, specialised research and technological expertise, independent contributions to impact and outputs, stakeholder engagement and external professional recognition. They were designed by a diverse group of stakeholders including some colleagues that may be considered as RTP's.

At the University of Liverpool, it was identified that due to the diversity of job families within our university that could potentially benefit from mapping to this pathway, it was not possible to create a comprehensive set of indicators that all individuals could map to. Instead, a set of essential indicators were produced together with a focussed set of desirable indicators. Colleagues are not expected to map against all the indicators but those most appropriate to their role. The indicators in the Outputs sections represent the area where most diversity between job families is expected to occur.

The pathway provides the opportunity for harmonisation of role titles across the university. However, it was recognised that some staff will want to retain more descriptive titles associated with their jobs. Regardless of how they and their line managers choose to functionally name their role, the pathway should provide some underlying structure that all staff will recognise when referred to. We have used Grade 6: Associate RTP, Grade7: RTP, Grade8: Senior RTP, Grade9: Principal RTP.

Grade 10 are the equivalent of Professors or senior managers and will typically have specific titles associated with their roles. An appropriate university title for a Grade 10 appointment should be determined on a case-by-case basis but a default descriptor could be Senior Principal RTP or Professor of Practice.



### Key Consideration:

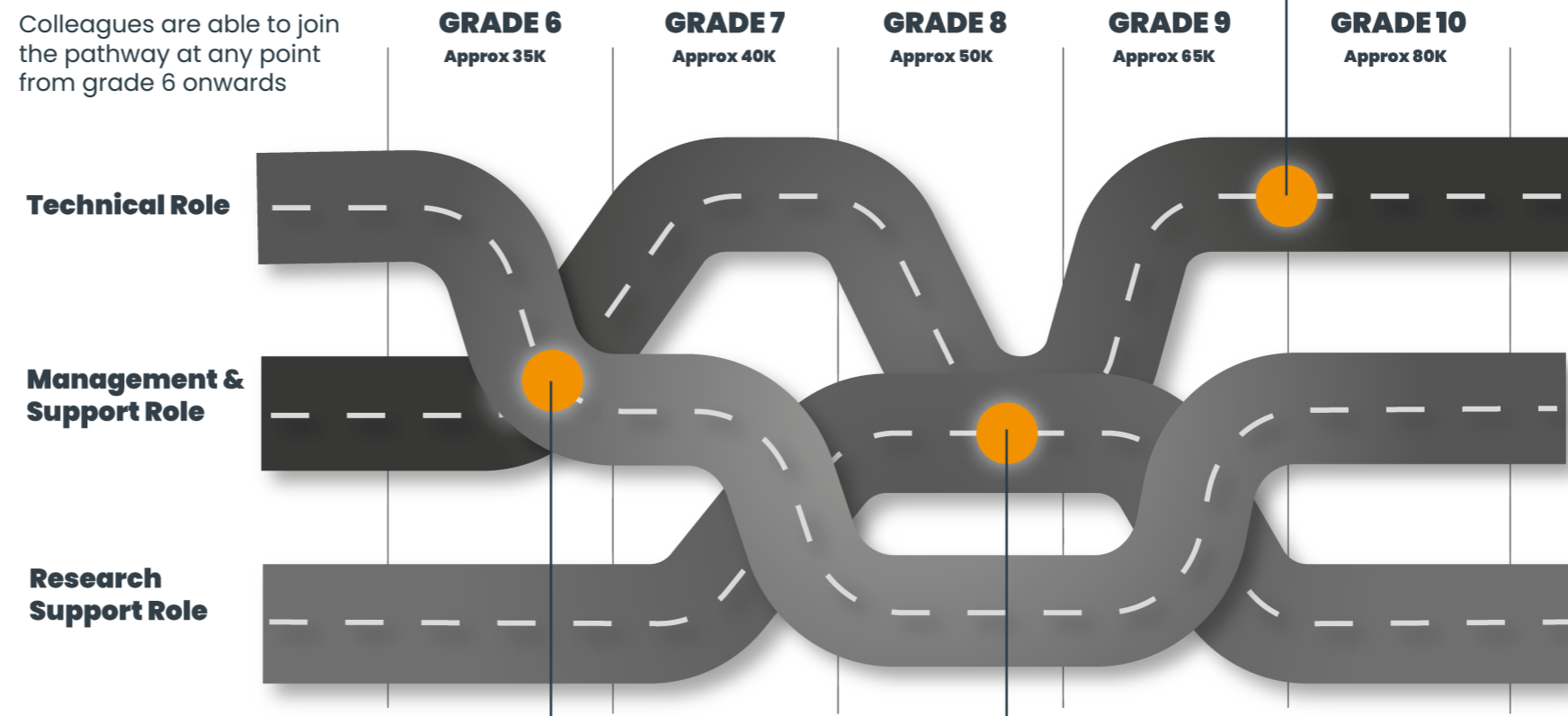
Do not underestimate how long this will take to develop – for us, post pandemic it was two years to agree the indicators, the approach and implement. This was after a failed attempt pre-pandemic. We failed as we continued to let the scope grow, attempting to use the implementation of this pathway to address other institutional issues.



### Key Consideration:

Our indicators can easily be adapted to your organisational requirements. However, the key is getting target community input to refine them so that they fully align with the types of specialist staff that you have.

Colleagues are able to join the pathway at any point from grade 6 onwards



In this example a colleague moves between management and technical specialist roles until they finally reach grade 10 as a world leading technical expert.

In this example a grade 6 technician moves across the pathway and takes up a management position in charge of a technical team. Later in their career they move into a research support role before moving into a leadership position.

In this example a research and support colleague briefly moves into a leadership position at grade 8, (this could be a sideways move) before returning to a research role at a higher grade.

# Delivery of Your First Cohort

There is a large amount of work to be done to promote the introduction of this pathway and to ensure there is understanding at all levels of the organisation as to what it is (and what it is not) and who can apply.

A series of events need to be held to clarify the process and answer questions, written communications will not be enough, this needs to be an interactive process to gain traction and ultimately to ensure there are applications!

As with scope, be clear about who is your target audience and try to target communications, utilising existing networks and mechanisms.

Enable sufficient time for applicants to put together time to develop their case and for feedback from managers, departments, and faculties, before the final submission to the panel. We strongly recommend a word count on your applications to make the process reasonable for the panel that will ultimately be assessing.



## Key Consideration:

It will take time to embed. It is a slow burn project that has significant impact for individual colleagues, for managers and for the institution.



## Key Consideration:

Enthusiasm from staff and managers will initially be tempered by widespread uncertainty in how to engage effectively. We introduced university wide support and assessment processes to ensure consistent messaging, advice and decision making.



Facility Manager,  
Liverpool Shared  
Research Facilities

Environmental Chemist,  
Environmental Sciences

Research Technician,  
Earth, Ocean &  
Ecological Sciences

Co-Director,  
Computational  
Biology Facility

Learning Technologist,  
Science & Engineering

# Potential Risks

At the University of Liverpool this change forms part of our agreed consultation process and therefore as soon as there was sufficient detail to share, contact was made with our Trade Union colleagues, UCU, UNITE and UNISON, who were supportive.

- The pathway provides a solution to current recognition and promotion issues faces by a subset of staff.
- It does not review or revise current contractual terms and conditions or introduce new contractual terms.
- Transfer to the pathway will be voluntary.

## Pension implications

At the University of Liverpool, staff transferring to Grade 6 and above from most other pathways must change to the USS pension scheme. This could have benefit implications that might dissuade some staff from joining the pathway. This was mitigated by making the transfer voluntary and colleagues were given the opportunity to remain on their current career pathway if they chose, based on their own assessment of potential costs and benefits (contributions to University of Liverpool Pension Fund are currently lower than USS). However, those colleagues that were promoted moved to the new pathway.

## Staff buy-in

The pathway will only be a success if most of the relevant staff want to be associated with it. A wide cross-section of potential beneficiaries was consulted to ensure that it was fit for purpose and perceived to be relevant. It was essential that we got engagement from all levels of management to help promote and embed the pathway. It was also important that it was reviewed after implementation and staff feedback

was solicited to address any perceived or actual barriers to access or assessment. A structured programme of awareness raising accompanied the formal launch.

## Assessment and potential for grade inflation

Since the pathway you hope to create is likely being introduced to provide appropriate recognition and reward for a group of staff that have been consistently overlooked, it is likely the roll-out will release some pent-up demand for regrading. To note, the facility to have a role re-evaluated should be retained as the RTP Career Pathway recognises individual growth, as opposed to a change/growth in the job. Applicants successfully achieving promotion will be viewed by colleagues as a key indicator of the success of the pathway. These staff represent potential ambassadors and will likely encourage wider buy-in from staff. HR input will be essential for ensuring that assessment is appropriately calibrated. We recommend that some assessment panel members are shared across Faculties to ensure harmonisation and that you review the pathway after the first year of implementation to be able to address any concerns about assessment that might arise.

## Costs

There may be pent up demand. The University of Liverpool decided that there would not be a quota allocated and that each case would be decided on its merits and therefore no "budget" was allocated.

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**Key Consideration:**  
Do not underestimate the level of resource this will take. We would recommend that you get a project team in place that focusses on keeping the scope tight.





**<https://www.liverpool.ac.uk/research/research-environment/research-technical-pathway/>**



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