

## **GUIDANCE FOR PROMOTION TO GRADE 8**

The guidance found below will help you select appropriate information to include in your application. The examples provided are not exhaustive, they are there to illustrate the types of activity that fit the criterion described.

In your application please address all of the criteria in section A **and** choose three of the criteria within section B.

### **SECTION A**

*Please demonstrate how you meet ALL of the criteria listed in this section.*

#### **A1 - You communicate complicated or specialist information that would not usually be easily understood by people outside your area of expertise.**

This considers all forms of communication you use in your role. You will be required to convey and understand information of a complex or conceptual nature which would not usually be easily understood by non-specialists. This will be on a routine basis. Communication will often be necessary to influence a desired outcome and so will involve influencing and negotiating with others. You will also give significant consideration to your audience and so the format and tone you use will be crucial to the successful delivery of the message you are trying to convey.

To help structure the information you provide in your application, you might like to think about:

- Who you talk to in your role and/or what do you write about?
- What type of communication is exchanged and why?
- How do you decide what to say/write and when to say/write it?

Examples

- Making presentations to large, mixed interest groups with diverse levels of understanding of the complex subject matter.
- Compiling bids and business cases for resourcing significant projects.

#### **A2 - You contribute to shaping the strategic plan for your function and lead the delivery of this within your own team or specialism.**

This considers your role in your immediate work team. You are likely to be directly inputting into the shaping of the strategic direction for your team/area and feeding into the overall objectives that need to be achieved. You may have input into the work of several sections within your function. Your role may also involve direct line management of a team and so you will also be responsible for allocating work, monitoring its achievement and providing feedback to staff members as appropriate. You will be responsible for staff motivation and taking action to address performance issues as required.

To help structure the information you provide in your application, you might like to think about:

- What teams are you involved in, what is their purpose and what are they trying to achieve?
- Who is in the team and what is your role within it?
- How are team members motivated and encouraged and how do you support this?

Examples

- Having involvement in drawing up strategic plans/objectives.
- Having involvement in setting objectives and planning for a strategic project.

### **A3 - You liaise with people outside your area to generate ideas and influence events or decisions.**

This considers who you liaise with and what you liaise about. You will be liaising with a range of people across the organisation but also externally. This will require an understanding of both your area and the sector. Liaison will be both proactive and reactive and will be at a level where you will be influencing key opinions and decision making. Therefore the impact of this communication and liaison will have a broad impact, affecting a significant area like a school or service. It's possible it could also have an institutional impact.

To help structure the information you provide in your application, you might like to think about:

- Who do you liaise with and why?
- Why is it important and how often does it happen?
- What information are you typically receiving/seeking and acting on?
- What types of things are affected/changed as a result of your liaison?

Examples

- Liaising with professionals in your area and at other HEI's to discuss the implications of new legislation/regulations.

### **A4 - The decisions that you make or are involved in have an ongoing impact on a broad area.**

This considers the decisions you make as part of your role and the impact those decision have. You will be making these decisions independently but you will also be making decisions in collaboration with others and be providing specialist advice to inform the decisions of others. The impact of this collaboration and advice will be significant and affect a broad area such as a school or service. It will also influence the development of business plans, long term strategies and strategic working relationships. On that basis, the impact will most likely be long term and the effects will endure for some time. Decisions may be difficult to reverse and the consequence of making the wrong decisions could affect the ability of your area to meet its strategic objectives. Consideration will almost certainly be given to the consequences and outcomes and therefore significant time may be invested before the advice is provided

To help structure the information you provide in your application, you might like to think about:

- How are decisions made and who makes them?
- What authority do you have to make decisions without the agreement of others?
- What are the results of making the decisions you are involved in?
- Who or what do your decisions impact and over what timescale?

Examples

- Being a member of a senior management team for the area making decisions on how to achieve the overall strategic objectives.
- Advising senior management on future staffing and organisational structure requirements.
- Being part of a group deciding on space requirements for a new build in line with future use and likely ongoing needs.
- Providing advice to a strategic steering group in your area of expertise.

### **A5 - You put long-term plans in place to make sure your team or area meets strategic objectives, managing and monitoring the successful delivery of these.**

This considers your responsibility for planning and organising. You are likely to have responsibility for a range of resources (people, money, equipment) which will include allocation and monitoring. You are likely to be planning over a year in advance or at least be inputting significantly into this process. The planning will be at a more strategic level, will be linked to achieving the overall strategic plan and will affect a substantial area of work. You will be aware of internal and external factors that are likely to impact on your planning and you will take steps to minimise these risks.

To help structure the information you provide in your application, you might like to think about:

- How do you plan and prioritise?
- What may impact any plans you put in place?
- What things do you need to consider and take account of?
- What resources are involved?
- How is your progress monitored?
- How do you maintain work quality?

Examples

- Inputting to the annual plan and budget setting.
- Helping to set strategic objectives and planning to achieve these in line with the overall UoL strategy.
- Helping to plan for the future across a varied/broad area.
- Planning projects and work streams over the longer term, considering resources and risks/barriers and the impact of non-delivery on progress towards the achievement of the strategic plan.

**A6 - You participate in complex problem solving where the chosen solution will have a broad impact on related activities or issues, and may set precedents that could affect future decisions.**

This considers the types of problems you deal with and how you solve them. In addition to dealing with reasonably complex operational problems, you will also be dealing with problems that are more strategic in nature. These are the types of problem that occur infrequently so there is no specific guidance to help and support you. This means you may be setting precedents in the decisions you make and having to consider the future impact of those decisions. The choice of solution may be complicated by the range of information available and the way forwards is usually unclear, often meaning you have to undertake several avenues of investigation. You may also have to deal with several complex queries at the same time.

To help structure the information you provide in your application, you might like to think about:

- What typical problems do you face?
- How often does this type of problem occur?
- What do you do about them?
- What options do you consider and how do you choose the best course of action?

Examples

- Investigating an area of ineffective working or systems failure and developing new procedures to address this.
- Developing new guidelines or procedures, such as those regulating the use of finance across a school or service area.
- Investigating a financial shortfall, analysing causes, contributing factors and how these can be addressed or managed, recommending options to address.

## **SECTION B**

Please demonstrate how you meet THREE of the following criteria.

**B1 - You initiate, develop or lead groups or networks to share ideas and identify ways to improve how things are done.**

*\*Please note that should you choose to provide evidence against B1, it is likely to overlap with the evidence required in A3. In this situation, there is no need to duplicate information in addressing both points. Simply provide the evidence for both under B1.*

This considers your involvement in groups or networks. You will be involved in groups and networks both internally or externally but in addition, you will be playing a significant role in the initiation and development of networks. You will be identifying the reason for a group or network and you will be the main driving force behind its initial set up and then its direction and purpose moving forwards. The groups or networks you are leading will be about building relationships to facilitate the exchange of information and ideas on an ongoing basis, sharing expertise to improve practices and processes.

To help structure the information you provide in your application, you might like to think about:

- What is the purpose of the group or network you are involved in?
- What is your role in it?
- What would happen if you were not a part of the group or network?
- What information will you be passing on or receiving?

Examples

- Initiating collaborative working groups.
- Chairing or leading a sub-group.
- Taking the lead on an external project consortium.
- Shaping the remit or direction of a network.

**B2 - You identify what research or analysis is required to investigate complex ideas or situations and ensure that any potential impact on related activities or issues are considered.**

This considers any aspects of investigation, analysis and research. Your focus will be on how to conduct the research and investigation as well as analysing and interpreting the results. This may include new applications of existing procedures or potentially developing new methods of investigation to suit the needs of the situation. These are likely to be complex in nature meaning the methods utilised could be broad ranging and complex in and of themselves. It is likely that the types of information being analysed may themselves be complex and that in order to identify what issues actually need resolving a number of different perspectives may need considering.

To help structure the information you provide in your application, you might like to think about:

- What are you researching and why?
- What data do you need to obtain?
- How do you obtain it?
- How do you decide how to gather the data?
- What do you consider when presenting data to others?
- Do you have to generate new or creative approaches and if so, how do you do this?

Examples

- Selecting and designing complex survey methods or tests and interpreting the results.
- Investigating, analysing and interpreting the implications of changes to resources.

- Conducting enquiries into complex complaints or system failures and indicating where improvements are needed.
- Analysing proposed changes to policies and procedures, identifying strengths, weaknesses and potential precedents, determining areas for further investigations and recommending a best fit solution.

**B3 - You support the welfare of staff or students using University support mechanisms, referring on to specialist parties as appropriate.**

This considers your responsibility for the physical and mental health and well-being of students, staff and others within the institution. You will be responsible for dealing with predictable welfare issues that are usually covered by documented procedures. This will mean the issue can often be referred to someone more specialist or advice on how to respond can be obtained where the issue is a regular occurrence although you will be responsible for seeing the issue through to an appropriate conclusion. Dealing with these issues will not be the main focus of your role but could still occur reasonably frequently.

To help structure the information you provide in your application, you might like to think about:

- Are you approached by others for help?
- What are the typical issues/problems you deal with?
- What do you do and how do you decide what to do?
- Are you able to refer the issue to anyone else for help?
- Is there any guidance material to help you find a solution?

Examples

- Ensuring appropriate action is taken to deal with disciplinary or other performance issues within a team.
- Responsibility for consideration of confidential mitigating circumstances when assessing an assignment, project, examination etc.

**B4 - You share your knowledge and expertise to develop other team members.**

This considers what involvement you have in the development of other team members. You will have responsibility for providing training or instruction, related to your role, to other team members although this does not require you to be a formal line manager. You may also coach team members and provide internal training sessions, sharing your experience and knowledge.

To help structure the information you provide in your application, you might like to think about:

- What do you guide, coach or instruct others to do?
- How do you do this?
- Who identifies the teams learning needs and decides whether training or development is required?

Examples

- Coaching or mentoring someone on an ongoing basis to improve their skills and performance.

**B5 - You undertake staff reviews for the members of your team and use these to identify training needs and agree with the person how these could be met.**

This considers what involvement you have in the development of other team members. You will be responsible for ensuring your staff know what is expected from them and how they are performing against this, providing constructive feedback as appropriate. You will undertake staff reviews and be responsible for the training and development needs of members of the work team and ensure steps are taken to address these needs. You will also be responsible for providing training or instruction to other team members and you may also coach team members and provide internal training sessions, sharing your experience and knowledge.

To help structure the information you provide in your application, you might like to think about:

- What do you guide, coach or instruct others to do?
- How do you do this?
- Who identifies the teams learning needs and decides whether training or development is required?

Examples

- Ensuring all staff are aware of what is expected of them and receive regular feedback on their performance.
- Carrying out regular staff reviews, identifying training needs and ensuring these are addressed.
- Providing ongoing coaching and training to the team.
- Training and supporting staff to develop skills appropriate to their role or career aspirations.

<b>B6 - You deliver training or briefings to share specialist knowledge with people outside your team, planning what you want them to learn and how you will deliver this.</b>
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This considers your involvement in the development of those *outside* of your immediate work team. You will be providing training/demonstrations a routine basis, sharing your knowledge and expertise as a subject specialist. There will not usually be any official assessment of those you are training but you will be designing and creating the content for delivery and reviewing this as necessary in light of the audience to whom you are presenting and participant feedback to ensure the message is conveyed effectively. You will also be giving consideration to the method of delivery.

To help structure the information you provide in your application, you might like to think about:

- Who do you train/provide demonstrations to?
- What do you train/demonstrate?
- How you adapt the material being presented? What do you take account of?

Examples

- Designing and delivering a structured a presentation on the application of complex procedures.
- Designing a programme of structured learning.