



## **Minutes of the 25th Annual Meeting held at Royal Holloway University of London 2007 (unconfirmed)**

### **Wednesday 18<sup>th</sup> April**

#### **0935 Welcome**

The meeting was opened by the host, Jacqueline Kolkowski.

Welcome address was given by Professor Alan Gange, Deputy Head of School of Biological Sciences RHUL who welcomed all the delegates to the 25<sup>th</sup> Annual Meeting. He mentioned that over the years there have been a lot of changes with departments merging, undergraduate student numbers increasing etc. It was also the second time that Royal Holloway was hosting the meeting. The previous meeting at RHUL in 1986 was hosted by Harry Parker & Don Field. Keele was the only other university to have hosted the meeting twice.

The School of Biological Sciences at Royal Holloway had recently undergone £13 million refurbishment and Professor Gange acknowledged the fact that Departmental Managers such as Jacqueline played a vital role in this.

#### **0945 Presentation**

##### **Full economic costing - Dr Lotte Boon, Research Support Office, RHUL**

Details of the talk are in Appendix A, page 11 - 29

The meeting thanked Lotte Boon for her presentation.

#### **1035 Presentation**

##### **Hunting Mammoths in Siberia – Dr Ian Barnes, RHUL**

Ian gave a fascinating talk going into details with a slide show of field trips to Tiksi and Cherski in NE Siberia to collect samples to recover DNA which is used to interpret past evolutionary events. Ancient DNA recovered from bone, teeth etc. More about the subject can be found in the book 'The Molecule Hunt: Archaeology and the Search for Ancient DNA' by Martin Jones.

The meeting thanked Ian for his fascinating talk.

### **1155 Presentation**

**Sustainability – Andrew Martin, Assistant Director, Management Services, RHUL**

Details of talk are in Appendix B, page 30 - 43

The meeting thanked Andrew for an interesting and thought provoking talk.

12.30 Lunch & suppliers' exhibition

### **1405 Presentation-Training Technical Staff**

**Matt Levi from the HEATED project**

Details of the presentation on 'A project to develop a business case for a National Framework and career structure for the professional development of Technical support Staff in HE' are in Appendix C, page 44 -73

The meeting thanked Matt for a very interesting presentation.

### **1450 Presentation**

**Edible Vaccines – Prof. Simon Cutting RHUL**

A fascinating talk was given on edible vaccines. Over 100 million doses of Enterogermina, an oral suspension of Bacillus spores are sold in Italy every year. This can be used for preventive or curative treatment for children with diarrhoea. At present one million children die from rotavirus diarrhoea per year in developing countries. There is no cure for rotavirus, so treatment of the disease is aimed at managing the symptoms.

The meeting thanked Professor Cutting for a fascinating talk.

15.20 – 15.45 Tea and suppliers exhibition

### **1545 – 1700 Breakout Sessions**

**Topics – HEATED & Sustainability**

**Day 1 ended with the Anniversary reception and Banquet at the Picture Gallery in the Founders Building**

## **Thursday 19th April**

### **0905 AGM & Associated Business**

#### **25/1 Welcome**

The Chairman (Alan Willcocks) welcomed members to the meeting and thanked Jacqueline for the first day's tour of Windsor followed by a boat trip along the Thames with a barbecue. Thanks were also given for the excellent anniversary dinner held in the Banquet Picture Gallery at the Founders Building.

#### **25/2 Attendance and Apologies**

Attendance: Jane Bromley, Colin Chinnery, Mark Cosgrove, Ray Dickson, John Dwyer, Michelle Finnegan, Mike Gover, Mick Hurst, Phil Jefferies, Jacqueline Kolkowski, Kim Lainson, Mark Lane, Lynne Lumsden, Haydon Morris, Arthur Nicholas, Michael O'Sullivan, Steve Parker, Ila Patel, Paul Phillips, Mary Pryce, John Robinson, Paul Rooney, Neil Sommerville, David Stanton, John Stephens, Amanda Taylor, Peter Whelpdale, Alan Willcocks, Lesley Hughes Fiona Purse

Apologies were received from:

Barbara Birch, Basil Boam, Christine Haskell,

#### **25/3 Minutes of the previous meeting and Matters Arising**

The minutes were approved. There were no matters arising.

#### **25/4 Chair's Report**

On behalf of UBMA, Alan thanked the officers and committee members for their work behind the scenes. He thanked Jacqueline and Neil for hosting the meeting and welcomed new members.

#### Message from Basil Boam

The University Biological Supervisors' Association (UBSA) was formed in 1983 by Basil Boam and David Smart, superintendents from the University of Sheffield with an initial membership of 19. In April 2000 the name was changed from UBSA to UBMA (University Bioscience Managers' Association) and the new constitution was introduced and agreed.

Alan thanked the officers of the committee and the organisers and said he had enjoyed his time as Chair over the last 4 years. UBMA has tried to ensure that it maintains its aims, decimates information and the association remains inclusive.

Vote of thanks for Alan as Chair for the last 4 years was expressed by John Robinson on behalf of the association.

## **25/5 Membership Secretary's Report**

### **Steve Parker**

The association now has 85 members.

3 members have retired, Audrey Jeffries, Dave Diggins and Chrisitne Haskell.

2 new members have joined since last year, Phil Baillie from London Metropolitan and there have been enquiries from Nigeria but no follow up.

Jacqueline proposed that the association should be looking to increase membership and will spend some time looking into this.

## **25/6 Treasurer's Report**

### **Paul Phillips**

The treasurer presented the accounts for 2006 which showed a healthy balance.

The targets for 2007 were:

- Maintain book/keeping/financial records suitable for audit
- Invoice members for 2007 fees
- Close account for 31/12/06
- Re-invoice fees for outstanding payments from members
- Assess financial status of association and make recommendations

In 2005 there were 56 paid members and in 2006 this decreased to 53 paid members. There was no income from sponsors in 2006.

Discussion on savings account and the current bank account & interest on UBMA funds followed. It was recommended to maintain the membership fee at £20 for the next year.

The treasurer's report was accepted, subject to audit by UBMA's auditors.

## **25/7 UBMA Representatives Reports**

### **7.1 NABBS**

John Dwyer attended the meeting held in Bradford from 6 – 8<sup>th</sup> September 2006 which included a visit to the Photography museum and a curry experience.

There was a presentation by Ken Bromfield and discussions on 'managing change'. Roger Dainty stood down as Secretary.

NABBS would like to keep their group small. The association will be approaching some universities for replacement memberships and are hoping to link a succession plan into the recruitment drive to ensure the association remains live and vibrant. The next meeting which is the 35<sup>th</sup> anniversary will be held in Cambridge.

This part of the meeting closed at 9.40

12.20 AGM and associated Business

## **25/8 Election of Committee Members**

### **Chair**

Mark Cosgrove was nominated by Jacqueline Kolkowski and seconded by John Dwyer. Mark accepted the nomination and asked if Alan would continue to chair the rest of the meeting. Alan agreed to this.

### **Secretary**

Ila Patel was re-elected unopposed, (nominated by Jacqueline Kolkowski and seconded by John Dwyer).

### **Membership Secretary**

Steve Parker was re-elected unopposed, (nominated by Paul Phillips and seconded by John Dwyer).

### **Treasurer**

Paul Philips was re-elected unopposed, (nominated by John Dwyer and seconded by Ila Patel).

### **Committee members** (two in addition to the hosts of the next meeting)

Lynne Lumsden was nominated by John Dwyer and seconded by Peter Whelpdale.  
Arthur Nicholas was nominated by John Dwyer and seconded by Peter Whelpdale.  
Both were willing to stand and were elected unopposed.

### **Co-opted members**

Jacqueline Kolkowski  
John Robinson

### **Auditors**

Jayne Bromley and Amanda Taylor were elected as auditors

## **25/9**

### **UBMA Representatives**

#### **.1 NABBS representative**

John Dwyer was nominated by John Robinson & seconded by Paul Phillips

#### **.2 HUBBS representative**

It was **agreed** that the new committee is to look into this.

#### **.3 Biosciences Federation**

Continue with the arrangement of information being available on the UBMA website.

## **25/10**

### **Changes to Constitution**

None proposed

**25/11**

**Membership Subscription**

Paul Phillips proposed this should remain at £20, this was **AGREED**.

Jacqueline Kolkowski will be looking into ways of increasing the membership of the association.

**25/12**

**Future Meetings**

At the 2006 UBMA meeting held in Aberdeen, Coventry was one of the suggestions as the venue for 2008 meeting, however this needs to be checked out with Anne MacMahon (Mark Cosgrove to contact Anne).

John Robinson & Arthur Nicholas agreed to host the 2008 meeting at Manchester in the likely event that Coventry will not be available as a venue. Thanks to John & Arthur.

There was some discussion as to whether the meeting should continue to be held annually and it was **AGREED** that it should continue annually.

**25/13**

**Any other business**

**25/14**

**Vote of thanks**

Closing remarks and vote of thanks were given by Mark Cosgrove.

A heartfelt thank-you from Mark to Jacqueline & her team on behalf of the association and the members present for hosting & organising the 25<sup>th</sup> Anniversary Conference. A memorable and worthwhile three days spent in the deep south. The first day started off with a visit to the historical town of Windsor passing through picturesque Datchet and the famous Eton College and the surrounding areas followed by a cruise on the Thames and a barbecue on board. This was followed by presentations and Association business on the second & third day. The recurring theme was changes taking place in higher education including sustainability, development of technicians, transferable skills management and the future.

The hospitality & food were excellent. The anniversary banquet was held in the impressive picture gallery of the Founders Building where a potted history of the last 25 years was given by John Robinson, thanks go to John.

**The meeting ended at 1300**

## 9.50 Feedback form Breakout Session

HEATED Project presented by Haydn Morris, Group 1 & Arthur Nicolas Group 2

This is a project close to the aims of the Association. The following points arose from the discussion

### Staffing & Job Spec Issues

- Staff recruitment – largely Graduate level
- Staff retention – relatively poor, often first step in career
- Research posts – largely employed to support specific research projects
- Teaching posts – largely preparation + set outs, little or no demonstration’ this is generally undertaken by post grads

### Training Provision & Delivery

- Appraisals – identify and drive training programme tailored to individual needs
- Continuing Professional Development (CPD) portfolio
- Manchester: 10d/yrs training {Roberts report)
- Manchester: Technical skills seminar programmes in house by Technicians/for Technicians
- Leicester – CPD programme developed
- Intra + Inter Univ skills exchange programmes Bath/Exeter
- Aberdeen- Lynne Lumsden Technician training programme 2 – 3yrs
- Out – reach training

### Summary

- Demonstrated/justified as giving added value & career prospect enhancement to graduate Technicians.
- Training driven by appraisals/personal development reviews
- Accreditation by e.g. IST City & Guilds
- Recognition by “the industry”

One of the aims of The Higher Education Academy is ‘to lead, support and inform the professional development and recognition of staff in higher education’ particularly in the teaching field. HEATED could do something similar for technicians. Important to get as many technicians as possible engaged in the project.

## **Sustainability** presented by Mandy Taylor, Group 1 & Arthur Nicholas, Group 2

Sustainability has a cost, as a result lot of ideas don't get carried out. HEFCE aware of this and will be giving some funds towards new build.

### Management

- Encouraging best practice i.e. attributable costs to School/Faculty's vs. cost to "University" as a whole.
- Value of Sustainability representatives/managers: "local" School/Faculty's vs. pan "University"
- BMS – benefits of environmental control via considered operation of such systems
- Set back for -Ventilation/Fume cupboard extract/heating
- Policy for 24hr operation of Buildings
- Controlling/restricting the use of heaters
- Use of lighting control
- Vending machines on 24/7, who pays?

### Water Consumption

- RO systems – measures to recycle waste water
- Reduced water consumption with condensers/distillation set ups via use of mini chillers
- Use of recirculating/electrical vac pumps to replace water driven pumps
- Steam generation – central boiler supply vs. local generation e.g. Autoclaves
- Bottled/coolers vs. cooled/filtered tap – cost saving/H&S issues/environmentally friendly.

### Transport

- Majority of Universities charging e.g. Manchester/Glasgow £180/£140 pa
- London Met: VCs policy of no staff parking
- A number run campus buses – free of charge
- Encourage use of bicycles – security issues i.e. bike shelter provision; shower facility provision. H&S associated with bikes stored in buildings

### Unexplored Issues

- Waste recycling strategies
- Statutory Sustainability in construction planning and design e.g. new builds lab fit outs

## 10.35 Presentation

### The future of technical services Management – Ken Bromfield, KCL

At present the career path for managers of technical services seems to be a pathway from bench to desk using a very old map.

For example Ken's career path

- trainee in chemical pathology
- technician grades in pharmacology
- chief technician / superintendent in Biochemistry
- Manager of technical services
- Finally a specialist

Context of change – current issues

- Competition, national & international
- Pay & modernisation - job profiling/evaluation/competency frameworks – career management
- Performance management (RAE/TQA)
- Focus on university strategic planning
- Institutional reorganisation (inter & intra)
- PDP internal & external

#### General Structure

- Head of School/Faculty
- Head of Department
- Departmental Services Manager for technical Services
- Manager of local areas, teaching/research/admin

#### Career Paths & Job Families

- Academic Career Pathway – Education, Research & Enterprise leading to Management Specialist & Admin Family
- Professional Career Pathway can lead to Management Specialist & Admin Family
- Technical & Experimental family
- Community & Operational family
- External career options

#### Management Competencies

Managing resources effectively

Exercising leadership

Managing change

Managing training & development

Raised expectations – Pandora's Box

The meeting thanked Ken for his presentation. Ken can be contacted at [ken.bromfield@kcl.ac.uk](mailto:ken.bromfield@kcl.ac.uk)

## **11.40 Presentation**

### **Transferable skills – Colin Chinnery & Mike Gover KCL**

This was a group discussion with Colin & Mike as the facilitators

A very diverse subject – what are transferable skills?

Knowledge learnt – ‘skills you acquire during any activity in your life, not just at work or in education that can be applied to other situations.’

Some examples of skills acquired by technical staff:-

- Technical
  - Specialist instrument & process
  - Information technology & software applications
  
- Non – technical
  - organisational
  - health & safety
  - communication
  - prioritising
  
- Technical staff in management roles
  - organisational
  - project management
  - facilities management
  - communication & negotiation
  - financial control
  - procurement
  - staff management & development

Does technical staff appreciate the skills that they have? – ‘I am just a technician’

- How could transferable skills affect departments?
  - changing roles/redeployment
  - loss of technical staff to other professions
  - motivation
  
- Questions
  - is this an issue
  - is there sufficient new blood entering our profession
  - does our profession engender transferable skills greater than others
  - could the development of transferable skills be used as a recruitment tool

How could you add value to another role?

The meeting thanked Colin & Mike for their entertaining presentation.

Ended at 12.15

# Full Economic Costing ( fEC)

University Bioscience Managers Association  
Conference

Lotte Boon  
Research & Enterprise RHUL  
April 2007

# Presentation Content

- 1. Introduction
- 2. Key differences between fEC and the previous costing system
- 3. fEC cost types and definitions.
- 4. Project costing
- 5. Costing and RHUL approval process
- 6. Prices

# 1. Introduction

- Lack of sustainability in HEI finances
- TRAC costing at institutional level
- Application of TRAC to projects ( fEC)
- fEC accepted as basis for RC and OGD pricing
- fEC is now our costing method for all activities

## 2. fEC versus the old costing system

- 1. Cost does not = price
- 2. Investigator hours are a chargeable cost
- 3. Facility (ie Estates) and college overhead ( ie Indirect) costs are based on the academic hours spent on the project.
- 4. The cost will be higher than the old system.
- 5. fEC includes cost not in Financial accounts.
- 6. All significant costs are indexed.

# 3. fEC cost types & definitions

- 1. Directly Incurred ( D.I)  
Expenditure that is incurred specifically for the project , an auditable cash cost.
  
- 2. Directly Allocated (D.A)  
Estimated costs of services ( such as staff and facilities) used by the project that are shared by other activities and projects
  
- 3. Indirect  
College overheads allocated to the project

# 3.1 Directly incurred

- Research Assistants recruited
- Laboratory technicians recruited
- Admin staff recruited
- Contractors
- Travel
- Purchased materials and services
- Meetings and publication
- New equipment purchases & maintenance
- Studentships
- Anything else you will have to pay for

## 3.2 Directly Allocated

- P.I and co-investigators allocated time
- Estates charges  
operating, maintaining and replacing our physical facilities
- Facility usage charges
  - Large free standing facilities, MRI & EMU
  - Other equipment usage costs not in Estates
- Pool technicians, admin staff, and other HEI staff allocated to the project
- Stationery, postage ,phone. These costs are part of the Indirect rate. RC s will not pay, but other funders will.

## 3.3 Indirect costs

- Central administrative and services costs
- Support activities, Admin, Central IT, Legal, Registry, Finance, Personnel, R& E, Library

## 3.4 Exceptional costs ( RC only)

The RCs have chosen to fund certain D.I costs in full, ie at 100%, and call them Exceptional. Other costs are currently funded at 80% by the RC.

- Equipment costs in excess of £50K

- Studentships

They will not actually pay our incurred costs, they will pay the fees (income ), stipends and training.

## 3.5.1 Cost type explanation

- Academic time  
P.I, RA and PGR time is academic time. Academic time attracts Estates & Indirect costs at a pre-calculated rate.
- P.I time estimation  
100% of a "standard" working year is 220 days of 7.5 hours which is 1650 hours per annum.  
Estimate likely hours required, not a % of working time.  
Include report writing time after the grant period .
- FTE, Full time equivalent ( 1 person for 1 year at 100% )

## 3.5.2 Cost type explanations

- Costing PI staff

RHUL does not use actual professorial salary for RC projects

For graded PI staff we use year 1 grade rate plus increments. RHUL uses "Sirius" costs from research finance

## 3.5.3 Technicians & Admin staff

- D. I. cost      staff recruited for project
- D.A. cost      time allocation of permanently employed staff
- RHUL uses “Sirius” rates from Research finance for specific staff

## 3.5.4 Cost type explanations

- Estates & Indirect costs expressed in FTE/annum
- Two level of Estates Costs:
  - Non lab department
  - Lab department
- Procedures to establish the rates are audited.
- RHUL rates are in line with the HEI sector.
- RHUL lab departments are Bio Science, Physics, Computer Science, Geography, Geology, Media Arts, Drama, Music, and Psychology

## 3.5.5 Cost type explanations

Calculating costs for estates and indirect

Eg 3 year project

One PI for 3 years @ 165 hours is 0.1 fte per year

$$3 * 0.1 \text{ fte} = 0.3$$

One RA for 3 years @ 100% is 1.0 fte per year

$$3 * 1.0 \text{ fte} = 3.0$$

Total project fte = 3.3

Cash cost is

Estates ( lab dept)  $3.3 * 9000 = £29700$

Indirect  $3.3 * 40000 = £13200$

# 4.1 PGR Costs & RC prices

- PGRs are “academics”, so they attract Estates & Indirect costs. They are deemed to attract lower Estates & Indirect costs  
Estates ( non lab) 0.5 of an fte, Estates ( lab) 0.8 of an fte, Indirect 0.2 of an fte  
In costing a project there would be PI time supervising a PGR. This is charged at the PI’s normal rate and Estates/Indirect costs are also charged
- RC pricing of PGR  
RC s are not paying PI Supervisor time and associated Estates/Indirect  
RCs are not paying PGR Estates/ Indirect  
RCs are paying fees/stipends/training  
(yes, fees are HEI income!)

## 4.2 Equipment & Facility usage

- If you can identify equipment that can be separately charged for it is usually to your benefit to do so.
- You need to establish operating cost, a charge out rate, document it, set up accounting.
- Finance do not have this information
- Finance need to ensure no double counting of costs, ie the cost is not in the overhead rates as well.

# 5. RHUL Costing & Approval

- The R&E fEC site includes a Research project Approval Form (RAF).
- The RAF form is attached to an excel costing spreadsheet that requires completion.  
Finance and R & E will assist completion and provide "Sirius" staff pay cost rates

# 6. Prices

- HEIs have to cover their fEC costs in total over all their activities
- RC and some OGD work will result in higher prices
- Some OGD work will be competitive tender. OGDs should pay 100% of fEC, but may rely on tendering to avoid it
- Charities & EU
- Commercial customers  
There can be no subsidy of non public research activity from public funds. Price is what you can negotiate.
- Pricing (where not dictated by the funder ) is currently down to the PI with input from R & E
- Reducing resources required in order to meet a price is not recommended

# Sustainability at Royal Holloway



- Fairtrade
- Energy
- Waste minimisation
- Composting
- Biodiversity
- Travel plan
- Green roofs
- The future

# Fairtrade

- 2<sup>nd</sup> College within University of London to achieve Fairtrade status
- Fairtrade tea and coffee served in all retail outlets, at meetings and conferences
- Fairtrade sugar and rice recently introduced
- Expanding range of Fairtrade products in College shop including biscuits, chocolate, juices, cereal bars, flapjack, shortbread, chilled coffee drinks and Eccles cakes

# Fairtrade

- Fairtrade wine is available in one bar and is on the wine list for all events and banquets
- Celebrating Fairtrade fortnight – homemade Fairtrade cakes on sale, free tasting session (tea, coffee, biscuits and chocolate), competitions to win hampers of Fairtrade goodies.
- Working towards better promotion of our Fairtrade status to external customers through conferences and events

# Energy

- Recently accepted onto the Carbon Trust's higher education carbon management programme
- 10 month project to measure the College's carbon footprint and draw up a plan to reduce emissions over the next few years
- New energy pages on College website
- Energy information sheet sent to all members of staff – hints and tips about how to reduce energy use
- Currently drafting similar information aimed at students

# Energy

- Investing £2 million in steam removal project
- Steam currently used for heating and hot water
- Will reduce CO<sub>2</sub> emissions to a third of their current levels

# Waste minimisation

- Bags for life

Introduced to encourage people to use fewer plastic bags. Satchel and shopping bag styles available. On sale in College shop

- Reusable mugs

To reduce the number of disposable cups thrown away each day. People are entitled to 5p off the hot drinks when they use the mug. The mugs proved popular during a trial period and we have now ordered a second batch

# Recycling

- White paper recycling in office and academic areas
- Printer cartridge and mobile phone recycling – 25 collection boxes around campus
- Recycling banks for coloured paper, glass, cans and tins and plastic bottles– service provided FOC by local council
- New waste contract will include improved recycling facilities for office areas e.g. cardboard, coloured paper, plastic bottles and metals
- Need to improve recycling service offered to halls of residences

# Composting

- Garden waste is mixed with cardboard and composted on site
- Looking at ways we can compost some of our kitchen food waste
- We are thinking about switching to biodegradable plates and cutlery rather than using disposables and hope to compost them eventually

# Biodiversity

- 10 year ecological management plan devised in 2002
- Identified badger sets and bat flight paths – both protected by law
- Increasing biodiversity of flora by clearing invasive woodland species e.g. rhododendron bushes
- Sowing wild flower meadows to increase biodiversity of grasslands

# The travel plan

- The result of a planning condition imposed by Council
- Aims to maintain or reduce traffic flow on campus year on year
- Emphasis is on encouraging sustainable modes of transport
- Walking, cycling, the College bus, public transport and car sharing

# Car sharing

- 100 members on car share database
- Plus informal car shares
- Looking at incentives for car sharing  
e.g. reserved car parking spaces
- Promoted through posters, intranet messages, staff inductions, outdoor signage
- Slow uptake

# Cycling

- Improvements have been made to facilities for cyclists – showers, new bicycle racks
- Dr Bike session this summer
- Looking at Cyclescheme to encourage more staff to cycle
- One big barrier to cycling – Egham Hill

# Green roofs

- Sedum roofs first introduced on Gowar and Wedderburn halls in 2005
- Helped the College secure planning permission
- Retain water, insulating, attractive and beneficial to wildlife, plants remove CO<sub>2</sub> and absorb pollutants from air
- The halls under construction will also have green roofs

# In the future

- Develop a College policy to buy recycled paper
- Waterless urinals
- Making better use of grey water and rain water harvesting
- Energy efficient building ratings



## Higher Education and Technicians Educational Development

A project to develop a business case for a National Framework and career structure for the professional development of Technical support Staff in HE

# Background

- 30,000 approx. Technical Staff working in HE
- 'Evidence' report commissioned by HEFCE 2004
- No representation
- Academy, AUA, Roberts
- Poor provision
- Loosing skills
- Age profile
- No new talent
- Training and development issues

# The Leadership Foundation for HE

- HESDA role diminished
- Some good work started
- Leadership Foundation for HE remit
- Project established to address issues

## Project Aims

- To identify common training/development needs for the HE technical staff community with the objective of enhancing their contribution towards academic excellence in learning teaching and research.
- To develop a business case for the professional development of HE support staff.

## Project aims

- To explore and make recommendations on an appropriate professional body to serve HE technicians and to administer a suitable programme of events and activities
- To research potential funding streams/options and to assess the feasibility of income generation to sustain an on going training/development and skills infrastructure.
- To promote and expand the recognised career and Continuing Professional Development (CPD) programmes for HE technicians.

## How?

- Project team
- Management Group drawn from across the whole of the UK
- Project funded and supported by the Leadership Foundation for HE

## Key Project Themes

- Establish a self funding and sustainable professional body for Technical Staff
- National Survey and creation of survey tool
- Populating the mailbase
- Setting up of web information and networking site
- Promotion of specialist skills programmes
- Promotion and further development of National CPD framework

## National Mailbase

- Already in use, funded by LF
- Growing
- Great potential nowhere near optimised
- Record of individuals, skills, offerings
- Locate providers and deliverers
- Inform the survey

## National web information and networking site

- Informed the project
- Informed the survey
- Enables networking
- Pulls regions closer together
- Updates the community
- A strand of CPD

# CPD Programme

- Designed by Technical Staff
- Work based
- Modern assessment methodology
- Growing number of participants and HEIs.
- Accredited
- Cost recovery basis
- Regularly updated
- On-line resources

## National Survey

- Technology originally funded by HEFCE (CROSS) by £250,000
- On-line survey tool
- Designed for Technical Staff
- Opened January for a month
- Data supports business case

# Stakeholders

- All LF members via mail base
- Staff Developers who attended the conference in November.
- All Scottish Institutions via Sandy Wilkie
- Tech-man mail base
- Staff-Development mail base
- HR Directors mail base
- Chief Executive - Higher Education Careers Services Unit
- HEFCE
- SHEFCE
- Chief Executive - HESA

# Stakeholders

- Director HR - UCAS
- UCEA -Woburn House Prof George white HR advisor visited by Bob Hardwick
- AMICUS – Mike Robinson National Officer visited by Bob Hardwick
- UNISON – Jon Richards National Officer visited by Bob Hardwick
- University UK
- SCOP - Standing Conference of Principals
- HE ACADAMY Victoria Eaton visited by Bob Hardwick
- Learning Skills Council (LSC)
- BUFDG
- Equality Challenge Unit
- SEDA
- COSHEP
- NATFHE

# Stakeholders

- AUA - Executive Secretary Lynn Rawlinson visited by Bob Hardwick
- Institute of Science and Technology – IST – Visited by Bob Hardwick
- QAA (Quality Assurance)
- AUDE ( Estates Managers)
- Student Residential Accommodation(ASRA)
- Managers of Student Services (AMOSSHE)
- Association of University Engineers (AUE)
- Procurement Officers (AUPO)
- Conferecne and Universirty Business Officers (CUBO)
- Environmental Ass for Univ and Colleges (EAUC)
- Safety and Health Association (USHA)
- Republic of Ireland Technicians Group

# Stakeholder meetings

- All contacted with project brief
- Positive response
- Series of stakeholder meetings before the survey to gauge opinion
- Post survey data set and meetings with key stakeholders

# Communication in partnership

- Inform technical community in any appropriate way
- Staff development network
- Communication problems through sometimes resistant hierarchy's
- Morale
- Willingness to move forward
- Self supporting and managed organisation

# Issues

- Funding?
  - Membership fees
  - HEFCE/Academy?
  - CPD fees?
  - HEIs?
- Potential?
  - Conferences
  - Skills programmes
  - CPD development
  - Other services?

## What happened? The survey

- Biggest HEI survey
- 44 HEIs
- 3,239 responses
- 724 from HEIs not signed up (22%)
- Over 80 HEIs if you include the above
- Large research led 'traditional universities'
- Small 'specialist' institutions

## The report

This report concurs with the findings of the 2004 Evidence report commissioned by HEFCE.

***‘We have identified a number of serious challenges regarding the need for and use of high-end technical support for HE research that in our judgement merit the particular attention of HEFCE and/or other stakeholders’***

## What the report hopes to address

- Loss of specialist skills
- Inadequate training and development across the sector
- No supporting infrastructure
- Demographic ‘time bomb’
- No forward planning to keep what we have and skill the workforce for the future

## What the report hopes to address

- Few coming into the sector
- Recruitment and retention issues
- Poor career development opportunities
- No strategy for change
- No representative body for the sector

## Report recommendations

- **Recommendation for a proposed structure/organisation/association for HE Technical/Specialist staff which will be financially self-sustaining.**
- **Recommendation to apply to HEFCE for ‘pump priming ‘ funding**
- **Recommendation to conduct a survey on an annual basis**
- **Recommendation for discipline specific skills programmes**

## Report recommendations

- **Recommendation to survey non-participating HEIs**
- **Recommendation to establish a web based networking and information exchange site for the UK HE technical and staff development communities.**
- **Recommendation for the development and branding of the skills database**
- **Recommendation to re-brand the mailbase**

## Report recommendations

- **Recommendation for the UK wide promotion and continued development of a national CPD Programme for Technical/Specialist Staff in HE.**
- **Recommendation for closer, improved and new links with key HE stakeholder organisations.**
- **Recommendation for a Regional (or UK conference) for Technical/Specialist Staff in HE**
- **Recommendation to act on Survey themes described in section 3.7**

## Survey themes

- A great enthusiasm for the survey itself with many commenting that it is 'about time' such a project took place.
- Significant length of service probably indicating a low turnover of these staff
- A predominately 'local' marketplace in terms of recruitment
- Improvements needed around the identification of training needs

## Survey themes

- Good levels of satisfaction with Staff Review and Development processes leading to real change
- Improvements needed in the number of staff taking part in the Staff Review and Development process.
- Great enthusiasm and need for 'generic' training and development
- Great enthusiasm and need for 'specialised' training and development

## Survey themes

- Evidence suggesting that regionalisation of development activity, especially specialised activity, would be welcome
- Great enthusiasm for a national qualification for Technical / Specialist staff together with an appropriate professional body
- Significant aspirations to move roles and develop careers combined with a desire for professional careers advice
- Clarity need around line management roles and responsibilities

## What has happened?

- Politics get in the way
- Lost time and momentum
- Stage 1 LGM bid to HEFCE successful
- Formation of small core HEATED steering group
- HEFCE support employment of consultant to prepare stage 2 bid
- Bid underway
- HEFCE panel meet to discuss stage 2 LGM bid on 24<sup>th</sup> April

## If successful?

- Work on the HEATED proposals will start immediately
- Need to re-enthuse the communities
- Interim 18 month project
- Must be self sustaining
- Membership fees from HEIs
- Income generation through conferences, courses, resources, CPD, other
- Suggestions please?

# Finally

- Support the initiative
- Contribute where possible
- Enjoy the rest of the day
- Thanks for listening