

# Research Professional Futures

## Institutional Survey Guidance Webinar

Recording for website

# Today's session



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# Outline of this session

- About the Research Professional Futures project
- The institutional survey: aims, principles and approach
- Completing the survey: practical tips
- Planned outputs from the survey
- Next steps

# About the Research Professional Futures project

<http://rpfutures.co.uk>

# What is Research Professional Futures?



Research  
Professional  
Futures

Research Professional Futures (RPF) is a £4.5M UK-wide programme funded through the Research England Development (RED) Fund.

The project aims to reshape how research is delivered in the UK by focusing on the visibility, recognition, training, and career pathways for the diverse community of **research professionals** who are essential to research.

The first part of the project involves auditing and analysing the current landscape of Research Professional roles through activities including interviews, Delphi panels, analysis of Jobs.ac.uk adverts, a survey of individual Research Professionals and this institutional survey.

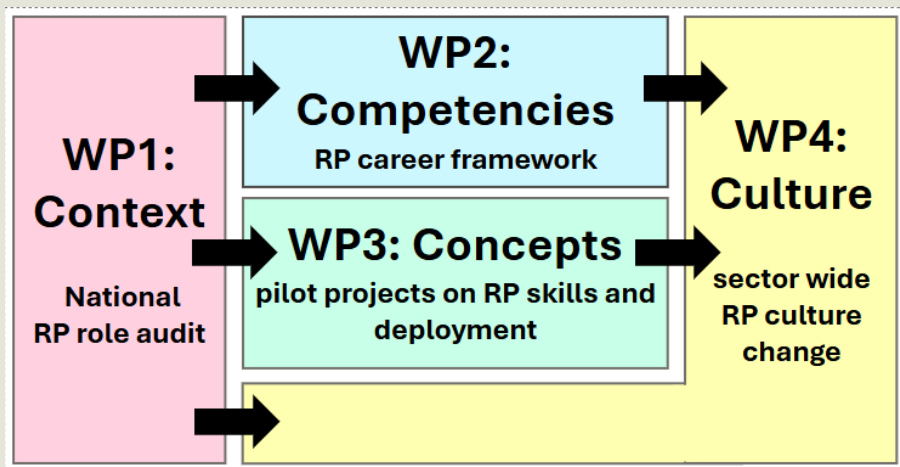


Research  
England



Research  
Professional  
Futures

# Work Packages & Objectives



## Work package 1: **Context**

- To audit and analyse the current landscape of RP roles and develop a shared vision for their future.

## Work package 2: **Competencies**

- To develop and implement the first unifying, sector-wide framework of core skills, behaviours, and career pathways for RPs.

## Work package 3: **Concepts**

- To pilot new institutional and regional initiatives that enhance and futureproof RP roles, including exploring the potential of emerging technologies and shared service

## Work package 4: **Culture**

- To co-create a practical, strategic 'RP Blueprint' to embed lasting change.

# RPF Leadership Team



**Lorna Wilson**  
*WP1 Lead*



**Steph Bales**  
*WP2 Lead*



**Isabella von Holstein**  
*WP3 Lead*



**Rika Nair**  
*WP4 Lead*



# RPF Project Team



**Karen O'Riordan**  
*RPF Project Officer*



**Katie Reynolds**  
RPF Research Culture  
Manager



# Key Delivery Partners



Prof Alis Oancea



Dr Jess Pilgrim-Brown



Rob Johnson



Dr Xin Xu



Dr Ben Hart

**University of Oxford**



Dan King



Angharad Roberts

**Research Consulting Ltd.**



# RPF National Commission



**SHAPE DIRECTION**



**TEST INSIGHTS**



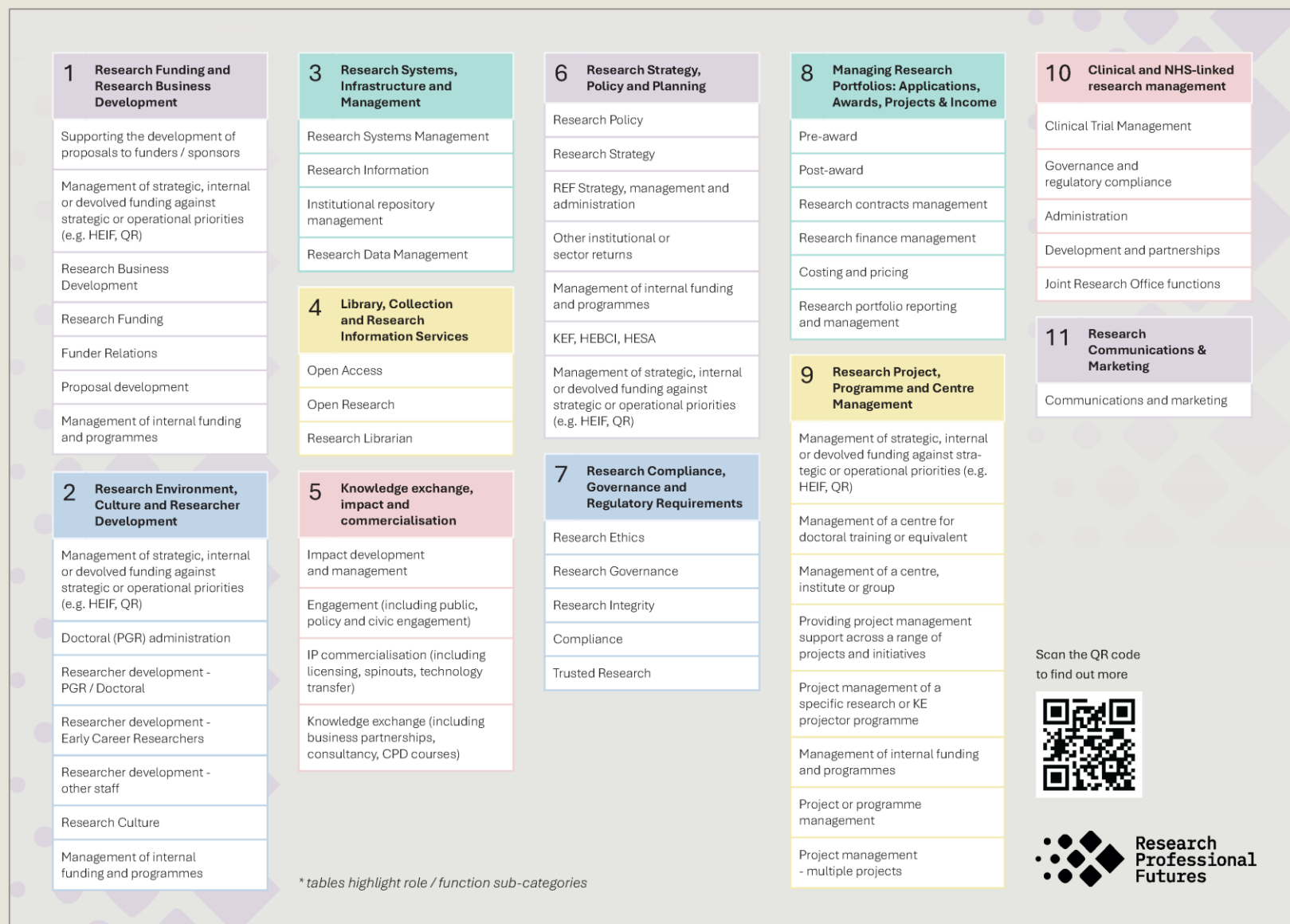
**SECTOR INFLUENCE**

**... A Critical Friend**

# RP areas of activity

An initial output from this project, based on analysis of a selection of job adverts, is this typology of 11 areas of Research Professional activity.

The typology is being used in the complementary individual survey (extended closing date of 18 September).



Scan the QR code to find out more



# Drafting an initial **typology of Research Professional roles**

The typology is used in the surveys and identifies 11 areas of Research Professional activity.

|   |                                                                 |    |                                                                                |
|---|-----------------------------------------------------------------|----|--------------------------------------------------------------------------------|
| 1 | <b>Research funding and research business development</b>       | 7  | <b>Research compliance, governance and regulatory requirements</b>             |
| 2 | <b>Research environment, culture and researcher development</b> | 8  | <b>Managing research portfolios: applications, awards, projects and income</b> |
| 3 | <b>Research systems, infrastructure, and management</b>         | 9  | <b>Research project, programme and centre management</b>                       |
| 4 | <b>Library, collection and research information services</b>    | 10 | <b>Clinical and NHS-linked research management</b>                             |
| 5 | <b>Research strategy, policy and planning</b>                   | 11 | <b>Research communications and marketing</b>                                   |
| 6 | <b>Knowledge exchange, impact and commercialisation</b>         |    |                                                                                |

# The institutional survey: aims, principles and approach

# The institutional survey aims to contribute to sector-level understanding of the scale and scope of RP activity

The institutional survey aims to:

- build a comprehensive picture of the Research Professional workforce across UK higher education; and
- provide an evidence base to improve the effectiveness of future planning, helping institutions better understand and articulate the people, capabilities, structures and support ecosystems that enable an excellent research environment.

It complements the **individual survey** which asks Research Professionals about their experiences of their roles and careers.

The typology is central to the approach to data collection in both the individual and institutional surveys.

We are only looking for a **single institutional response** from each participating HEI.

# Survey development and piloting

The institutional survey has been developed with:

- Input into question design from the leadership team;
- Alignment between question topics and those covered in the individual survey;
- Piloting by **five institutions**, testing the feasibility of responding to questions; and
- **Further iteration** after piloting to clarify some questions and to reduce the burden of responding to the staffing questions (the survey now only asks for headcount of Research Professionals).

# Overview of the survey structure

| Section heading                                 | Further details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Institutional context                           | Contextual information about the participating institution, including FTE of research active staff and approximate research income.                                                                                                                                                                                                                                                                                                                                                                                                |
| Staffing                                        | Organised at three levels of Research Professional, this is the heart of the survey which asks about the headcount of RP staff in: <ul style="list-style-type: none"><li>• Central institutional functions and services</li><li>• Cross-cutting structures (such as Faculties or interdisciplinary support structures) serving multiple academic units</li><li>• Up to three examples of local units (such as departments or institutes)</li></ul> The aim is map RP staff numbers to areas of a typology of RP areas of activity. |
| Environment, culture and Research Professionals | Questions about any initiatives or programmes to support Research Professionals.                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Challenges and opportunities                    | Areas of challenge and opportunity; skills needed over the next five years; areas for collaboration.                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Participation agreement                         | Opportunity to review and download responses and submit the completed response.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

# Staffing questions: the heart of the survey

- The heart of the survey is the collection of quantitative data about headcount numbers of Research Professionals, mapped to the typology of RP activity;
- Headcount, rather than FTE, is being used to reduce potential survey burden and maximise engagement;
- Staffing questions aim to capture Research Professional activity at **central institutional level**; in **cross-cutting structures** (such as Faculties or interdisciplinary support structures) serving multiple academic units; and in a small sample of **up to 3 local units**; and
- The approach aims for a proportionate balance of depth, complexity and effort.

# Completing the survey: practical tips

# Preparing an institutional survey response

- A unique link has been sent to key contacts in institutions;
- We only expect one response from each participating institution;
- The target date for responding to the survey is **Friday 25 September**;
- A Word document version of the survey has been shared with the unique link: the Word document can be used to help to gather data and to prepare responses before entering them into the online survey;
- For staffing questions, **estimated** responses about headcount are acceptable and **judgements about placement** across the typology should be based on people's primary areas of responsibility; and
- A guidance and FAQs document has been shared to support your response.

# Example question

There is guidance introducing each question.

## 5. Please indicate the headcount in central institutional Research Professional roles within each area of Research Professional activity.

In order to ensure consistency for analysis and reporting, please note the following points:

- In this survey, the term "Research Professionals" is used to mean "the specialist staff who play a vital role in delivering high-quality, ethical and impactful research – from research development and strategy to public engagement, knowledge exchange and research culture" but excludes technical and academic staff.
- If you don't have staff undertaking work in the relevant area of Research Professional activity, just leave that row blank.
- If the roles in a specific area of Research Professional activity are located in more than one central unit, please include the names each central unit separated by a semi-colon. For example "Research Office; Legal and Governance; Registrar's Office".
- You should aim to provide an estimate of headcounts as of 31 July 2026.
- As far as possible, you should include all institutional Research Professional roles, including vacant posts or those where the post holder was on long term absence.
- The headcount figures should reflect the primary area of Research Professional activity of the individuals included in the headcount. It may also be possible to allocate headcounts to areas of activity from an organogram.
- In exceptional cases, where there are staff with responsibilities across multiple different areas of activity, please include them in the "Multiple areas of activity" row and please provide some more detail in the next question which asks for free-text comments to aid interpretation of your responses. For example, this may include roles such as research service Directors with responsibilities across all research services, or - in small teams - people with a wide range of responsibilities across the typology areas.

Later in this section, we ask for information about Research Professional activity in a small sample of local, discipline-based units (e.g. departments or institutes).

|                                                                            | Central unit(s)<br>in which these<br>roles are located | Total headcount |
|----------------------------------------------------------------------------|--------------------------------------------------------|-----------------|
| 1. Research funding and research business development                      |                                                        |                 |
| 2. Research environment, culture and researcher development                |                                                        |                 |
| 3. Research systems, infrastructure, and management                        |                                                        |                 |
| 4. Library, collection and research information services                   |                                                        |                 |
| 5. Research strategy, policy and planning                                  |                                                        |                 |
| 6. Knowledge exchange, impact and commercialisation                        |                                                        |                 |
| 7. Research compliance, governance and regulatory requirements             |                                                        |                 |
| 8. Managing research portfolios: applications, awards, projects and income |                                                        |                 |
| 9. Research project, programme and centre management                       |                                                        |                 |
| 10. Clinical and NHS-linked research management                            |                                                        |                 |
| 11. Research communications and marketing                                  |                                                        |                 |
| Multiple areas of activity                                                 |                                                        |                 |

# How to select up to three local units

- We are asking institutions to provide up to three **examples** of local, discipline-focused units (e.g. department, school, institute) from **different disciplinary areas**;
- We are asking for up to three units rather than a full institutional census because we recognise that identifying and counting Research Professionals at local level can be difficult, particularly where roles are informally defined or dispersed across departments;
- Focusing on a small, illustrative sample allows us to build a meaningful picture of the local landscape while keeping the burden of survey completion manageable;
- There is a question asking for the reasons for selecting each sample local unit;
- We recognise that different methodologies may be used in different local units: please use the comments box to help us to understand the specific approach taken.

# Completing the survey

- There are opportunities to add free text comments throughout the survey – please use these to add context to your responses and to help us to understand any areas of uncertainty. There is also a question at the end of the survey which provides the opportunity to record any specific limitations to your ability to respond to the questions not captured elsewhere;
- **Even a partial response is useful:** if you are unable to answer a question, please leave this blank and note the reasons for this in the comments field, where available;
- **Save and continue** is available from page 2 onwards; and
- There is an option to download and save your responses at the end of the survey, in order to keep your own record of the submitted responses for your institution.

# Planned outputs from the survey

# Benefits to participating institutions include:

- We will provide early sight of findings from this survey to the institutions which have participated, including some broad summary conclusions regarding points of similarity and difference between your institution's responses and those from the wider set of participating institutions;
- This will focus on narrative descriptions of the aggregated data, reflecting the nuance and caveats relating to different approaches to answering the survey questions and will provide insights, rather than benchmarking; and
- The process of gathering data to respond to this survey may assist in your institution's preparations for the Strategy, People and Research Environment element of REF 2029.

# How will the institutional data be used and reported?

- Personal information is being collected to enable us to contact you about any queries or areas for clarification in your response and in order to be able to provide you with advance insights into findings from this survey.
- Personal data will be separated from the survey responses prior to analysis.
- Aggregated data and insights will be shared with the Research Professional Futures team.
- All potentially identifying features of the data relating to individual HEIs will be removed before sharing with the RPF team.
- The aggregation of the institutional responses will use groupings based on bands of research income reported to HESA.
- Where appropriate, groupings based on university mission groups may also be referenced.

# Planned outputs from the survey and wider project

- The findings and insights from the survey will be shared with the RPF wider team and National Commission;
- Project outputs will be disseminated through the project website, social media, conferences, grey literature (project and Commission reports), and in professional and academic articles; and
- Additionally, the project aims to develop a web resource to support the translation of findings and outputs from RPF into organisational change.

# Next steps

# Next steps

- The institutional survey aims to contribute to sector-level understanding of the scale and scope of Research Professional activity;
- One response from each participating HEI with unique links shared by email;
- The survey is open and accepting responses: the target date for completion is **Friday 25 September**;
- Participating institutions will receive early sight of insights and findings from the survey; and
- You can ask any questions about the survey by emailing [angharad.roberts@research-consulting.com](mailto:angharad.roberts@research-consulting.com).

# Thank you!

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<http://rpfutures.co.uk/>



Research England  
Development Fund

