

GUIDANCE DOCUMENT FOR TECHNICIANS AND TECHNICAL MANAGERS

This document is intended to support technical staff and their managers in understanding the **Expected Values, Behaviours and Responsibilities of Technical Staff and Managers at Warwick**, and to help prepare for annual review discussions.

The information includes things to consider before the meeting (including questions for managers that may be used to encourage discussion). The areas include performance in the role, potential gaps and how they might be filled, and work-life balance and how this might be addressed. There is also a draft Development Plan and Record Form that might be helpful in assessing current and future development needs.

Information on current development and Networking Opportunities are included with appropriate links to webpages and other websites.

Your feedback on this document would be really appreciated to enable us to ensure that it contains information that is useful to you in the future.

Please provide feedback to technicians@warwick.ac.uk

Expected Values, Behaviours and Responsibilities of Technical Staff and Managers

We acknowledge the evolving and increasingly strategic role of technical staff across the University (e.g. contribution to research delivery, infrastructure and cross-University projects).

Responsibilities of Technical Manager

Line Management

- Provide advice, guidance and support to technical staff in areas of career development and progression through the annual review process. Use the process to discuss role requirements and objectives for development and career progression, but also for future succession planning to avoid skill gaps.
- Encourage Technical staff to input into discussions around changes and enable them to input into decisions in the work area or wider department issues. This could also involve input into wider faculty or University initiatives (including major projects/infrastructure developments or cross-departmental activity).
- Encourage membership of relevant committees and project groups, including enabling staff to attend Technician Commitment updates and events.
- Ensure adherence to ED&I initiatives promoting inclusivity for all Technical Staff.
- Awareness of mental health initiatives and promote wellbeing and assistance programmes for technical staff, particularly those in a student-facing environment.
- Recognising the work of technical staff, ensuring appropriate contributions, particularly for research technicians, and promoting and recognising work of technical staff at department meetings including nominations for any awards.
- Encourage outreach activities and include collegiality/community duties on all role descriptions to enable learning and sharing of skills in a safe environment

Training & Development and Career Progression

- Encourage staff to undertake skills and development training including work shadowing and secondments, where appropriate, to enhance and develop skills within the team
- Enable and support access to Professional Registration schemes and other training and development provided by ITSS supporting Technical Staff in all areas, including leadership.
- Encourage staff to take part in the annual review process (or hold more regular reviews) to discuss training and development and career aspirations. Promote (in line with the guidance) opportunities for development including reference to personal development.

Responsibilities of Technicians

Line Management/Supervision

- Take opportunities to supervise students, staff, temps etc. to gain experience where this does not form part of normal role
- Actively share learning and be involved in, and involve others, in working flexibly to cover all areas of the work

Training & Development and Career Progression

- Undertake training & development activities for work tasks but also for personal development that will open up potential opportunities for career progression in the future
- Take part in the annual review process and take up training & development opportunities offered in line with objectives and record for future career progression purposes
- Embrace opportunities to be involved in Technician Commitment meetings/groups or attending networking meetings, or other University/department committees or meetings, in your area of work to enable future opportunities.
- Take part in annual success planning/career progression discussions (as part of annual review process) to gain access to skills/experience that may open up future opportunities
- Consider appropriate CPD activities for professional development. Take responsibility for career progression working with line management and providing feedback on needs and opportunities.

Responsibilities of Department/School /University

- As a signatory to the Technician Commitment initiative, work with the Technician Commitment Steering Group to embed actions from the ongoing Technicians Commitment Action Plan.

**HOW TO APPROACH AND PREPARE FOR AN ANNUAL REVIEW MEETING:
Things to consider and suggestions for discussion**

The Annual Review process is an opportunity for individuals and line managers to discuss performance in role, contributions, achievements, skills development and career aspirations. It is also an opportunity to consider any future plans with a view to developing skills that are essential for the role, opportunities to mentor/develop others, provide support and flexibility across the team and for organisational succession planning for resilience and business continuity.

This information sheet aims to provide Technicians and Technical Managers with guidance on preparation for a meeting together with possible questions to consider in aiding preparation (not all will be relevant). There is also information relating to behaviours and expectations which may also be helpful to you when preparing for your meeting

Before the meeting:

To enable you to get the most out of the annual review meeting you should take some time to prepare in advance, and think about what you have worked on in the past year, taking into consideration the following questions your manager may ask:

- How would you describe your year so far, or since the last annual review?
- What do you enjoy about your role and can you develop that?
- What were the positive contributions you have made to the overall University or team?
- What have been your key/notable successes over the last year?
- Think about a goal or objective - how do you feel it has gone? Describe whether it was successfully achieved and how?
- Can you share an example of when you went above and beyond in your role?
- Have there been any changes or adjustments to your goals throughout the year and why was that?
- What challenges did you encounter, if any, and how did you respond to these?
- What support did you need to overcome them and how was this provided?
- What aspects of the role do you not enjoy and were there were any difficulties? What were they? How did you deal with them?
- Did you undertake any development and how you were able to use this, or if not, why not?
- Have you learnt a skill or technique during the last year and how has that enabled you to work differently?
- Is there is anything that might help you to develop your skills such as training, work-shadowing etc. Do you know if this is available and how to access this?
- What are you looking to achieve in the short to medium-term with regard to career development? Does this exist in this institution?
- What would make you feel more supported, valued or secure in your role and your future here?
- Do you have opportunities to share your skills and knowledge with colleagues?
- Do you understand how your role fits into the University strategy and values?

The following questions may help you to think about your role and how this might be covered during any absences:

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- Are there aspects of your role that would be difficult for someone else to pick up quickly? For example, to avoid single points of failure or specialist knowledge dependencies, are there any tasks, pieces of equipment or processes that no one else is currently trained in?
- If you were away for an extended period, what knowledge or resources would your manager need to know in order to ensure the service runs effectively? For example is there any documentation that would be helpful to support continuity and knowledge sharing across the team (eg. SOPs, equipment guides, key contacts, or brief 'How to' guides)
- Who in the team would be best placed to learn aspects of your role and would you be willing to support in their development?
- Have you identified any risks within your area, where a service relies heavily on a single point of failure or where equipment or facilities require investment?
- How would you feel about mentoring, buddying or co-training newer staff in the future?
- What one thing would you change about the way in which your department or service operates?

Use the Skills Development Plan and Record Form to make a note of any skills that you have and could use to develop other or of any skills that you require or would like to obtain in the future. It may be possible to obtain these skills from workshadowing or networking with colleagues across the University (the Technician Commitment Steering Group can facilitate this).

It might also be helpful to think about your work-life balance and discuss aspects of this at the meeting (although this can be discussed at other times of the year too):

- Do you often find yourself working beyond your contracted hours?
- How frequently are you able to take short breaks during work hours?
- How easy is it for you to switch off from work during your days off?
- Do you feel that taking your annual leave negatively impacts your work or team?
- Do you often work during times that should be for rest?
- How often are you expected to respond to work emails outside of working hours?
- Do you feel pressure to remain connected to work while on holiday?
- How frequently do you check work-related messages during your personal time?
- Are you comfortable speaking up if you feel overwhelmed with work?
- In one word, how would you describe your current work-life balance?

If a need for change is identified, please arrange a further meeting (separate from PDR) to discuss the following:

- What changes need to be made to achieve a better work/life balance?
- Are these changes realistic?
- How can you go about implementing the changes?

Use the questions and information above to make notes to prepare you for the meeting and use this as an aide-memoire in the meeting to enable you to engage more fully with the process.

At the meeting:

- Engage in the conversation and ask questions – this should be a two-way discussion about you and your role
- Don't be afraid to ask questions if what is being said to you isn't clear or you disagree
- Ask for feedback and be prepared to discuss how things might be done differently, or improved
- Be proud of your achievements and remind your manager of these
- Think about development or career opportunities that might be available to help you personally, or enable you to achieve your goals
- Ask how your manager will support you in your efforts to develop
- Discuss the priorities for the coming year and what might be achievable
- What challenges can you anticipate and what could you do to overcome these?
- What skills will help you in achieving your goals, and what support, if any, would you like to develop these?
- Which skills would you like to use more or less of?
- What areas of work interest you? What roles or responsibilities might you be interested in exploring?
- Discuss your plans and aspirations to assess whether this is something that the University could support you with

Record of the meeting and action points:

Forms are made available online for recording the PDR discussion and the majority of technical staff will use the form produced for Professional Services staff. For Specialist Technicians, it might be more helpful to use PDR Form for Academic Staff.

However, we recognise that some staff struggle with completion of forms and it is important therefore to note that it is the record of the discussion and any action points that are the key areas of importance and not the form on which they are recorded. It is better to make a record of the discussion in whatever form is easiest for you rather than being put off doing this by use of a structured form.

SKILLS DEVELOPMENT PLAN AND RECORD

Skills analysis record – current situation

What skills, competencies and behaviours are required for the task/role I need to do?

Skill	Level of Competence	Behaviour	Comments

How would I rate myself for each of the required skills? Complete the rating for each skill.

Skill	Rating 1 Requires development	Rating 2 Competent for the task	Rating 3 Competent and could train others	Comments

Development plan – future situation

Identify the skill and the level of competence required and how I can achieve this.

Skill	How will I achieve this	When do I need to achieve it

Development Record – completion of achievement

Skill/tasks achieved	Date achieved

Technical Staff Development Opportunities for discussion at PDR

The information below is aimed at technical staff and their line managers to support the PDR process, but also as a useful guide for other times of year. Warwick has committed to enabling technical staff (including Research Technicians funded by grants) to a minimum of 2 days per year for professional/personal development, which could be a combination of the things available below. This is in addition to any other relevant training required for the role.

The UK Institute for Technical Skills & Strategy (ITSS) has a number of opportunities, including courses such as leadership and management and access to funds such as knowledge exchange placements in the UK and globally: [Opportunities for Technicians - UK ITSS](#).

For technical specialists, Warwick is the lead on the EPSRC funded UK Technology Specialists Network: Research Technical Professionals Opportunities, Knowledge and Skills (TSN ROKS) project. TSN ROKS provides opportunities from funds for outreach demonstrators, hosting undergraduates through to an international conference fund: <https://itss.org.uk/tsn/tsn-roks-opportunities/>

TRAINING

Training has been designed from the ground up for technical staff but we also have the opportunity to bid for bespoke training where needed! If there are soft skills you would like to access but can't find in the links below, let us know technicians@warwick.ac.uk.

Development opportunities are available through ITSS, TSN ROKS and Warwick's Learning & Management Development Team but there are also opportunities for on-the-job development activities including our work-shadowing process set up specifically for technical staff [Work Shadowing \(warwick.ac.uk\)](#).

ITSS has a range of leadership programmes. They also offer a strategic level leadership programme. Details can be found here [Technical leadership programmes - UK ITSS](#). They also have a knowledge exchange placement fund to allow you to learn new skills and share best practice with an institution either nationally or internationally [Knowledge Exchange Placements - UK ITSS](#).

Programmes and Short Courses (both online and in-person) delivered by the Leadership and Management Development (previously L&D) Team at Warwick can be found here <https://warwick.ac.uk/services/lmd/>. Coaching and Mentoring and bespoke development opportunities are also available.

NETWORKING

Networking can take many forms, including conferences, meetings, forums and internal communities of practice such as annual Technician Commitment Focus Groups. Opportunities to network can be facilitated through:

Warwick Technician Events which are held twice a year and include an update on the Technician Commitment at Warwick, activities, showcasing of work undertaken by technicians with a chance to network. Details can be found on the TechNet website [Technet@Warwick](#).

Research Technical Professional Forums are held on a regular basis and create an environment in which to share ideas, solve problems and discuss opportunities and collaborations. Further information can be found here [rtpforums \(warwick.ac.uk\)](http://rtpforums.warwick.ac.uk).

For those on the management strand of the technical job family, the **Technical Managers in Universities (TMU)** network is a fantastic resource to join for free and includes a JISC email to ask questions of peers and an annual conference. The website is here [Technical Managers in Universities – TMU](http://TechnicalManagersinUniversities-TMU).

For those on the specialist strand, the **UK Technology Specialists Network (TSN)** is a useful free network to join, also with a JISC email and annual conference. TSN has also secured significant EPSRC funding to run further opportunities for technical specialists.

CAREER DEVELOPMENT

Through the Technician Commitment we have published a Technical Staff Career Pathway which can be found online. We have recently piloted a new Careers Advice Programme for Non-Specialist Technicians which will run again in the Autumn. We have also piloted a Technical Specialists Promotional Pathway. Details can be found on the TechNet website Technet@Warwick.

Mentoring and coaching is available at Warwick. Further information can be found here [Coaching and Mentoring \(warwick.ac.uk\)](http://CoachingandMentoring.warwick.ac.uk).

GENERAL INFORMATION

For up-to-date information on the latest opportunities available, please access the links below:

ITSS website - [Home - UK ITSS](#)

ITSS Newsletter - [Contact - UK ITSS](#)

Information for Technicians at Warwick - Technet@Warwick

Learning & Management Development at Warwick - [Leadership and Management Development](#)

Contact us:

E-mail – technicians@warwick.ac.uk

X - @TechnetWarwick

Website – Technet@Warwick