Evaluating Impact through Self-Assessment & Future Action Planning

Organisation: University of Exeter

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Contents

Self-Assessment

> **Please provide an overview of technical staff structures in your organisation, along with details of any changes to these over the past 6 years in response to the Technician Commitment.**
>
> In 2015, technical staff at The University of Exeter were brought into a single professional home under the name 'Technical Services' which allowed the provision of a flexible and agile service to support teaching and research across the institution. The university underwent a restructure in 2022 which moved the institution from six Colleges to three Faculties, as well as the revision of Professional Services Divisions and Departments. At this time, Technical Services was repositioned under the Research Division whereas previously we had been homed under 'Campus Infrastructure and Operational Support Services'. This move to Research has positively impacted the service by increasing collaboration with key stakeholder groups we already interacted with heavily. For example, we now have much better access to information across the whole research pipeline, by working alongside colleagues from the stages of bid development through to project outcome and publication. This enables us to have a much more 'forward look' to support the sustainability of the service. Alongside this restructure, the role of Director of Technical Strategy & Services was created to replace the Head of Service. See figure 1 for the new University of Exeter Professional Services structure:

New professional services structure
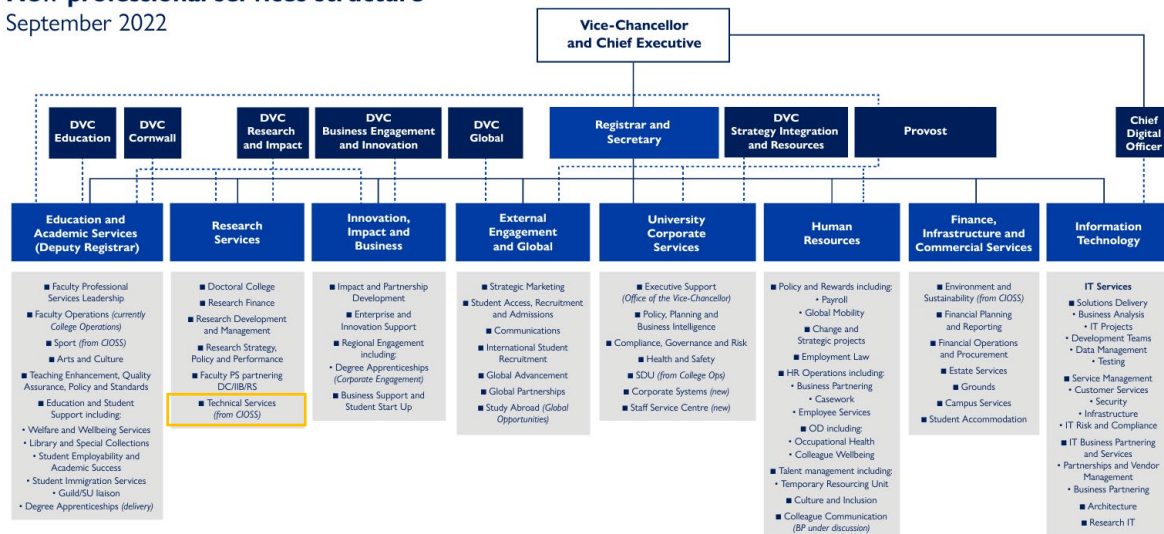September 2022

Figure 1.

In October 2023, we announced the "Exe-Tech Strategy 2030", a dedicated technical strategy for the future development of the university's technical equipment, infrastructure, and people which can be viewed as Appendix 1 (Official launch to come February 2024). Alongside this strategy, the service was renamed to '**Technical Strategy & Operations**'. This decision was made to move away from the use of the term 'service' and to better reflect the work we will be undertaking.

To date, Technical Strategy & Operations consists of about 250 staff members who support teaching and research in all three Faculties: the Faculty of Humanities and Social Sciences (HASS), the Faculty of Health and Life Science (HLS) and the Faculty of Environment, Science, and Economy (ESE). Appendix 2 shows an organogram of the department of Technical Strategy & Operations.

Since its inception, the department has had standardised job descriptions and job titles, however, these are currently being reviewed and updated alongside the university's focus on Professional Services Career Pathways. Over the years, job descriptions were naturally amended as new roles became available, however this moved them away from the standardised format they were meant to hold. After a report from the Exeter Professional Career Framework Review Group, it was decided that our job descriptions should be renewed to focus on competencies rather than specifics, which would support the principles of a "squiggly career" and promote transferable skills. Alongside this, we re-standardised our job titles (figure 2) across grades with a view to implementing these into a more clearly defined Career Pathway structure as part of a project across the whole of Professional Services.
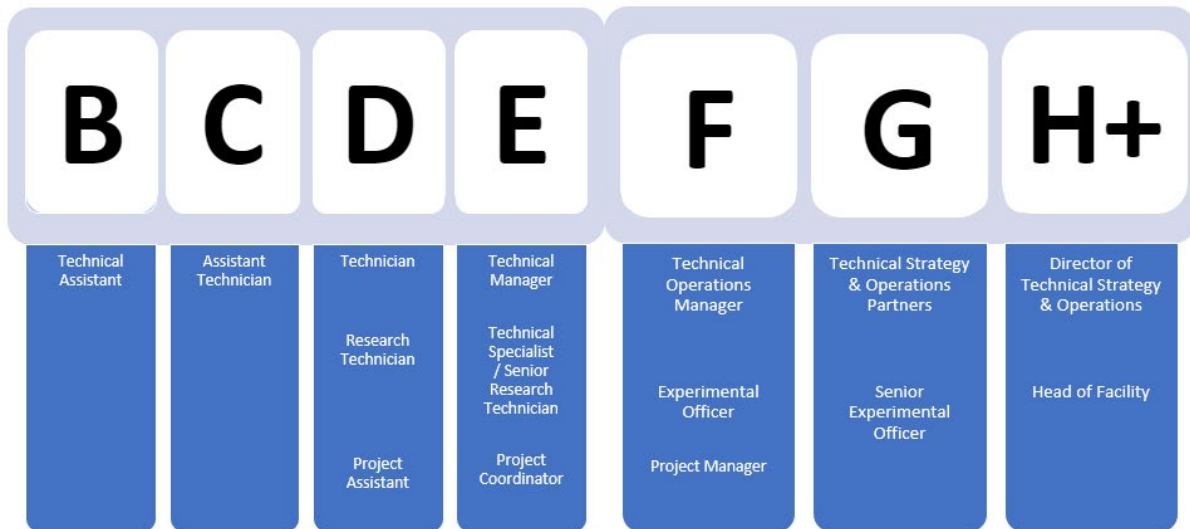
Figure 2.

A key focus of this job title standardisation was to bring the term 'technical' back into our jobs, which had fallen away over the last few years, to remove the repetition of job titles across grades to increase transparency, to more easily define the responsibilities at each grade for example, by removing the term 'manager' where it wasn't appropriate, and so that these titles work across the breadth of the department, whether someone works in a traditional wet laboratory, a workshop, a studio, or in the field.

These recent changes to our department's structure and job titles have been championed through the Technician Commitment Working Group and support the aims of Career Development and Sustainability across the institution.

Please provide an overview of the governance, leadership and reporting lines of the Technician Commitment at your institution, along with details on how it is resourced, and information on how your organisation has engaged with the wider community within and beyond your institution. How has this developed since you became a signatory?

The Technician Commitment at the University of Exeter is managed through our Technician Commitment Working Group, which consists of appropriate representatives from across the university. Chaired by the Project & Operations Manager in Technical Strategy & Operations, there is representation from technicians at all levels, from more junior Project Assistants and Technicians through to senior Technical Strategy & Operations Faculty Partners as well as the more recently appointed Director of Technical Strategy & Operations. There is also representation from the Learning & Development team, with the Head of People Development and the Learning & Development Manager in charge of apprenticeships. The full terms of reference and membership of this group can be viewed as Appendix 3.

To ensure leadership at an institutional level, this group's progress is monitored through the University's institutional Research and Impact Executive Committee (RIEC) which consists of senior Associate Pro Vice-Chancellors for Research & Impact as well as senior professional services

colleagues representing research for their directorates. The Director for Technical Strategy & Operations champions the work of the technical community on this group to support embedding the actions of the Technician Commitment in practice and policy. In addition, specific related items to support the actions of the Technician Commitment are brought to this committee for discussion and endorsement.

The working group and actions against the plan are financially supported by the Technical Strategy & Operations operational budget, though we aim to cost recover wherever possible through the use of sponsorships or grants.

We work collaboratively across the institution and also externally where required to support the aims of the Commitment. For example, in 2023, the working group led on the creation of an institutional Attribution Policy. This involved stakeholder collaboration with colleagues across the Research Division, the library and Special Collections, Governance and Ethics, and academics too. The policy was published in October 2023 and is owned by the Research and Impact Executive Committee as part of the university's wider Research Integrity policies.

Externally, the University of Exeter is part of the GW4 Consortium alongside Bristol, Bath, and Cardiff Universities. Members from Technical Strategy & Operations sit across three separate working groups as part of this: Research Infrastructure & Sustainability Steering Group (RISSIG), the RISSG Research Facilities Visibility Task Group and GW4ward Steering Group (GSG). Each of these groups focus on improving cross-institutional collaboration, with the latter specifically focusing on the TALENT Commission Report and how GW4 institutions could work together to tackle gaps in response to the recommendations from the report.

The University of Exeter are also members of both HEaTED and the National Technician Development Centre (NTDC), and through these memberships collaborate and share best practice with other institutions, whether through networking groups, training sessions, or conferences and events.

Additionally, in July 2022, after the Technician Commitment Signatory Event in York, we set up a Discord server called the "UK Technician Network". This network was developed subsequent to discussions at the Signatory Event which highlighted that colleagues were looking for opportunities to make informal connections and share best practice in a way which was less inbox intensive than already existing networks, which allowed space for different conversations to take place at once between those in differing specialisms, and in real time. Due to issues with Microsoft Teams limiting team members from external institutions, it was decided that Discord would provide a platform where these conversations could take place. There is more engagement required with this network for it to be utilised to its full potential, but its existence has already supported the formation of connections between Exeter, Plymouth, Northumbria, Durham, and more.

We have also been working with the University of Southampton to support the development of a new South/South-West Technician Network, the first meeting of which was supported by the Technician Commitment Collaboration Fund. This meeting, which followed our Technical Services Conference (which is always open to colleagues from external institutions and this year hosted visitors from Bristol, Plymouth, and Southampton), included colleagues from the aforementioned institutions as well as Bournemouth Arts University, and the University of West England. We discussed the benefits of a local geographical network and what each institution was able to bring to the group, and how we can work together to further goals Tef the Commitment.

As detailed under Action 17 in Appendix 4, we have also supported our staff to engage with external conferences and events, at times presenting at these to share best practice. This includes a presentation at the Technician Commitment Signatory Event in September 2023 on our conference which was supported by the Technician Commitment Collaboration Fund.

In addition to working alongside other specialist services at Exeter where appropriate over the last 3 years, we have opted this year to take an innovative approach to the development of our next action plan and to expand the scope of the services we are including under our Technician Commitment work wider than just our traditional 'technicians'. Under our new action plan (Appendix 6), we will be collaborating with colleagues in the Library and Special Collections, Digital Humanities, Research Software Engineers, Exeter IT, and Digital. We felt that this was appropriate after recognising the second largest specialism for technical professionals noted in the TALENT Commission Report was IT and Digital specialists. It was decided to develop, through the working group with support from HR, a definition of 'Technical Professional' at Exeter, recognising that there is no 'official' definition, in order to describe the services we agreed were in scope, and to help support other specialist departments to also join at a later date should they also recognise their role fits the definition provided. This definition was agreed by combining a few different existing definitions such as from UKRI and HEaTED, and is as follows:

A Technical Professional is a person who is trained and/or skilled in the techniques, tools and technology of their subject, who provides the practical application of knowledge and expert technical insight, including hands-on support in directly contributing to teaching and learning, research and enterprise activities.

Technical Specialists use their technical expertise and knowledge and their practical, analytical and management skills to make a range of vital contributions to research, innovation, and education, including (but not limited to):
- *Delivering the goals of a research and innovation project*
- *Maintaining and developing the environment, standards, resources, materials and facilities needed to deliver research, innovation, and education*
- *Teaching others and being proponents for best practise in the design, use and analysis of research techniques and methodologies*
- *Managing budgets, facilities, procurement and teams directly associated with projects, equipment, instruments and resources*
- *Providing strategic direction to the institution, taking into account specialist experience, and feeding this into the research and teaching agendas of faculties and departments, guiding academic leaders into new possibilities and opportunities*

Key 'criteria':
- *Specialist – it requires training and dedicated knowledge (either gained through education or experience)*
- *Supports and delivers research, education, and/or knowledge exchange & innovation*
- *Practical and operational – there is almost always a practical element, including when digital*

It is felt that those colleagues whose careers align with this definition often experience similar challenges in their careers and would therefore all benefit from being included under the scope of the Commitment. We are therefore hopeful that having more areas of the institution working to the Commitment will enable us to have much more power behind our actions. From January 2024, the structure and governance of our Technician Commitment response will therefore be updated the

reflect their inclusion, including our Terms of Reference. Our new action plan has been developed in full consultation with these groups.

Technicians, and our work towards the Technician Commitment, were also specifically referenced within our REF2021 institutional environment statement on our People and Staffing strategy, "We have a dedicated action plan and provide resources to support the careers of technicians, and the development of Research Software Engineers". Additionally, technical support is referenced throughout each of our 26 Units of Assessment environment statements, showing the breadth of support provided and recognition of these roles.

Please provide a RAG analysis on your institutional 36-month action plan indicating which activities you have undertaken and completed (green), which are in progress (amber) and which are still to be carried out (red). Please provide an explanation for those categorised as red.

This may be detailed here or attached to this document as an appendix.

Please see Appendix 4

Please provide evidence that your previous action plans are having impact. (For example, you may wish to provide links to initiatives, websites, testimonials, articles/blogs).

Please also refer to Appendix 4. Direct quotations have been provided under each action, gathered from our feedback workshops held throughout October.

Please provide details of how your institution is enacting the recommendations of the TALENT Commission (https://www.mitalent.ac.uk/theTALENTcommission).

We have undertaken two mapping exercises against the TALENT Commission Report, one against our own action plan which you can see in Appendix 4 & Appendix 5, and one alongside GW4 partners. The below statement has been provided on behalf of the GW4 institutions:

"There is broad support from GW4 institutions of the TALENT Commission recommendations and recognition of their relevance and importance to our wider technical staff strategies. As such, our GW4WARD steering group undertook a mapping exercise of our university Technician Commitment action plans against TALENT's Recommendations to better understand the areas that need further development, and to consider how together, our universities might be able to respond more comprehensively. Whilst there is considerable progress being made towards the TALENT recommendations, we recognised that there is more we could explore to further support our technical staff communities. As such, our universities will continue to review our progress against the TALENT recommendations, to nurture and enhance our technical capabilities for the future."

Please provide a 36-month action plan; detailing plans to ensure your organisation continues to address the themes of the Technician Commitment and details of how impact will be evidenced and initiatives resourced: (this may be detailed here or attached to this document as an appendix). Please evidence how the 'technician voice' was present in the development and formation of the 36-month action plan.

Please see Appendix 6 for the full action plan.

This action plan was written in full collaboration with the staff at the heart of each service represented, and was mostly done in two halves:

For those within Technical Strategy & Operations, who have been working on the Technician Commitment since 2017, the Project & Operations Manager, Emma McArdle, ran six 3-hour workshops throughout October/November:

Wednesday 4th October 13:00-16:00, Streatham Campus – Visibility
Wednesday 11th October 13:00-16:00, St Luke's Campus – Recognition
Tuesday 17th October 13:00-16:00, Streatham Campus – Sustainability
Wednesday 18th October 11:00-14:00, Penryn Campus – Visibility & Recognition
Tuesday 24th October 10:00-13:00, Penryn Campus – Sustainability & Career Development
Thursday 2nd November 13:00-16:00, St Luke's Campus, Career Development

These workshops were drop-in sessions which allowed coal-face staff to reflect on the work which took place on our previous action plan, and to propose, develop, and comment on new actions going forward. After each session, comments were digitised onto a Microsoft Whiteboard and shared via email and Teams for additional comments. These have allowed the Working Group to determine which actions may need ongoing attention, or where additional signposting might be required to ensure everyone is aware of the work which has taken place. This led directly to the development of our new Technician Commitment SharePoint site which is a hub of resources, information, and useful links under each of the actions undertaken so far. We look forward to building on this in the years to come. You can see a photo from one of these workshops on our Twitter.

Secondly, due to our expanding the scope of the Commitment to other specialist technical services across the institution, we needed to do some additional work to introduce these colleagues to the Commitment, to explain why it is relevant for them, and to give them an opportunity to feed into the development of our new action plan.

To this end, Emma joined an all-staff meeting for each of the services to provide an overview of the Commitment:

Tuesday 24th October 15:00-16:00, online
Wednesday 25th October 11:30-12:30, hybrid
Tuesday 31st October 14:00-15:00, online

They then also held three hybrid workshops which allowed attendees to reflect on the challenges they face in their careers, and to consider how they might begin to address some of those challenges:

Thursday 2nd November 09:30-11:30, hybrid
Friday 3rd November 12:00-14:00, hybrid
Tuesday 7th November 09:30-11:30, hybrid.

The culmination of these workshops is our action plan, complemented by a resource of feedback and ideas gathered from across the breadth of technical staff at the university of Exeter, which will help the future Working Group to focus their activity over the course of our next plan.

Please confirm that your Technician Commitment status and 3-year action plan is published on your organisation's website and provide the relevant URL here:

Our Technician Commitment webpage is currently hosted as part of Technical Strategy & Operations' webpages:
https://www.exeter.ac.uk/departments/technicalservices/staffdevelopment/techniciancommitment/

Soon, however, this will be moved under the Exeter Professional webpages, in order to highlight that the scope of our response has expanded to include other specialist services and to provide more centralised visibility of the Commitment.

Signed…… …

Emma McArdle,
Project & Operations Manager, Technical Strategy & Operations
(Technician Commitment Nominated Institutional Lead)

Date: 17/11/2023

Signed…………………………………..

Professor Lisa Roberts,
President and Vice-Chancellor, University of Exeter
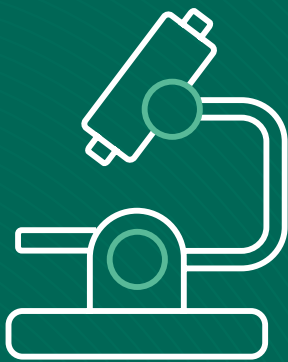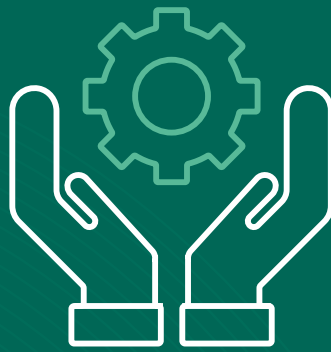(Technician Commitment Signatory – Leader of Institution)

Date: 12/12/2023

Exe-Tech Strategy 2030:

Innovate, Sustain and Nurture

Contents

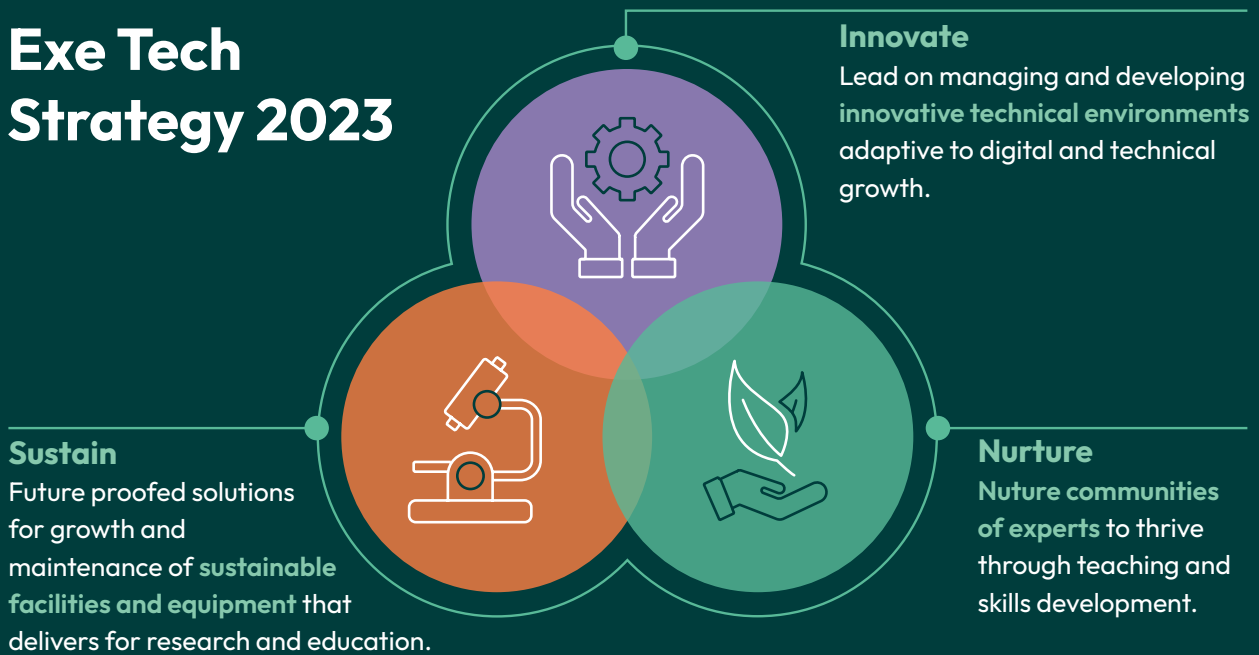# Exe-Tech Strategy 2030:
Innovate, Sustain and Nurture

Our Purpose

To provide expertise, equipment, facilities, and spaces that optimise the power of our education and research, through adaptable and sustainable technical capability and capacity.

Our Vision

To achieve this, we will build on our foundations of technical expertise and capacity across the University and within faculties to deliver as the service group, 'Technical Strategy & Operations' in partnership with academics and relevant professional services teams.

Exe Tech Strategy 2023

Innovate
Lead on managing and developing **innovative technical environments** adaptive to digital and technical growth.

Sustain
Future proofed solutions for growth and maintenance of **sustainable facilities and equipment** that delivers for research and education.

Nurture
Nuture communities of experts to thrive through teaching and skills development.

We will deliver this vision to support education and research by working in **partnership** with academics, professional services and external partners, guided by the University values (Community, Inclusion, Discovery, Excellence and Respect). Cross-cutting across the delivery of our vision we commit to working collaboratively, sustainably and digitally.
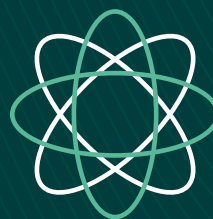
Discovery

Respect

Excellence

Inclusion

Community

Innovate

It is critical we adapt our spaces and technical environments to deliver innovative education that contributes to student experience and grows our research power. Technical Strategy and Operations will **lead on the effective and efficient management and development of innovative technical spaces** acting as the expert interface between research and education needs and infrastructure requirements (such as estates, regulators, health and safety, digital and IT) thus supporting faculty decision making in this regard. These environments include:

a) Specialist spaces on our campus sites (including research facilities, physical laboratories, workshops, and studios)

b) Off-site locations including field sites and partner/ commercial sites where we need technical capability and capacity (NHS, HEI and industry partners)

c) Digital laboratory and workshop environments that will change rapidly in the next 10 years

Rapid growth in digital and technological advances and how we deliver teaching and research will impact on these environments. Consequently, physical environments wil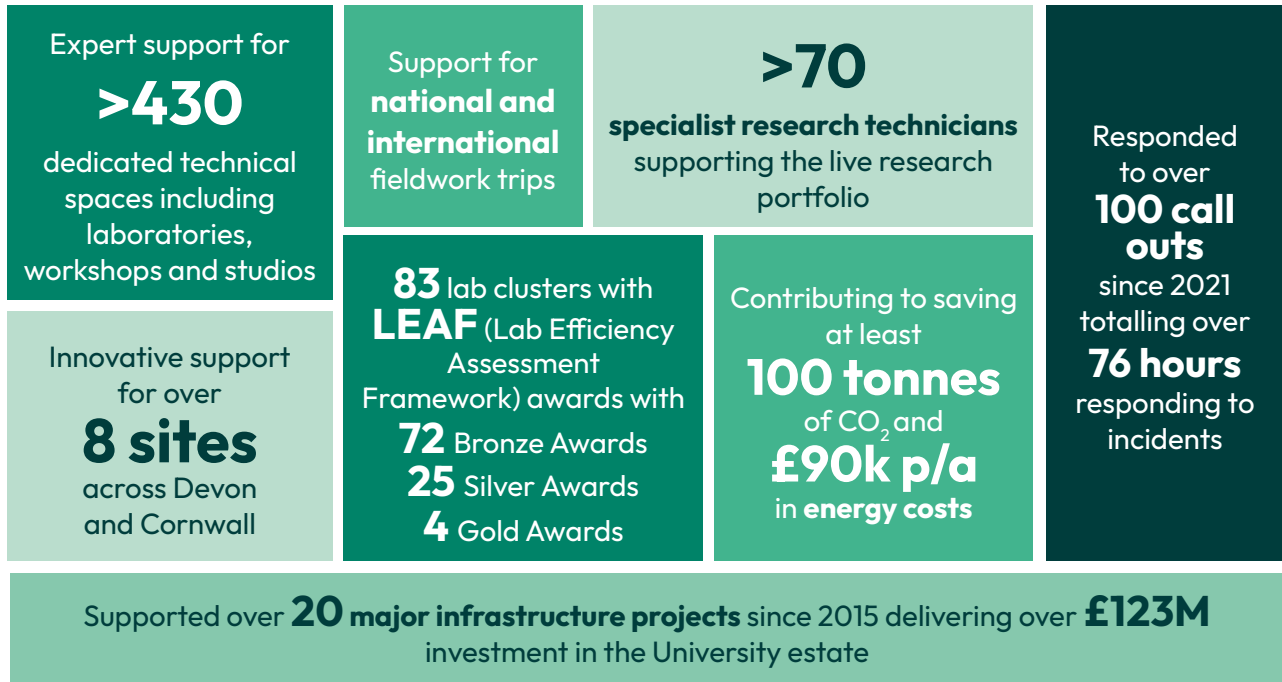l need to be innovatively designed so they are not only safe and compliant but adaptable and futureproofed as well as taking into consider growing EDI needs. We will also work with faculties to plan spaces and lead on recommendations that are design focused on research, innovation and teaching priorities, and that leveraged funding is maximised.

We will work in partnership with other teams (e.g. Digital) as well as commercial partners to ensure our service adapts to manage and develop, as well as being educators in digital laboratory and workshop spaces. We will also work with colleagues who deliver highly specialised services such as IT and the library who have similar challenges with the adaptability of spaces. Skills development of our service and the ability to provide these skills for teaching and research will be vital to deliver this theme in a landscape of rapid changing digital and technology advances.

Environmental sustainability will continue to be a primary driver. Technical Strategy and Operations will take leadership on environmental sustainability in practice to establish exemplar behaviours for the community and taking a proactive role in delivering the University's NetZero targets.

Cross Cutting Activities	Interdependencies	Enablers
Research Environment	Digital Strategy	Digital Skills Development
Research Culture	Library Strategy	Funding and Research Performance
Environmental Sustainability	Science Park Strategy	Partnerships
Student Experience	Faculty plans	Capital plans

What have we achieved so far?

Expert support for

>430

dedicated technical spaces including laboratories, workshops and studios

Support for **national and international** fieldwork trips

>70

specialist research technicians supporting the live research portfolio

Responded to over **100 call outs** since 2021 totalling over **76 hours** responding to incidents

Innovative support for over

8 sites

across Devon and Cornwall

83 lab clusters with **LEAF** (Lab Efficiency Assessment Framework) awards with

72 Bronze Awards
25 Silver Awards
4 Gold Awards

Contributing to saving at least

100 tonnes of CO_2 and **£90k p/a** in **energy costs**

Supported over **20 major infrastructure projects** since 2015 delivering over **£123M** investment in the University estate

What will Exe Tech 2030 deliver?

☑ Coordinated and prioritised strategic plans (across multiple timescales) for supporting all our technical environments.

☑ Effective leadership and management of technical environments.

☑ Champions in environmental sustainability practices to support our NetZero targets.

☑ Innovative agile teaching delivery as educators providing solutions for practical teaching that enhance student experience.

☑ Specialist and adaptable laboratory design expertise for research and innovation spaces.

☑ Coordinated expert field work provision and support.

☑ Digital and emerging technology skills development to technical services staff as well as skills development for new teaching pedagogy and cutting-edge technology development.

☑ Horizon scanning for education and research spaces, the needs and the design focus.

How will Exe Tech 2030 be delivered?

Faculty Technical Roadmaps: Lead on the development of strategic plans for all our technical spaces with planned roadmaps, in collaboration with faculties and estates to prioritise activities.

Science, Facility and Innovation spaces: Support the development of the science park strategy (and any commercial or facility spaces) so that those technical environments can be planned and allow for spaces on our campuses.

Education Solutions: Develop concepts and business plans for 'super-labs' across campus to deliver adaptable and effective teaching solutions.

Research and Education Design: Lead on innovative laboratory and space design for teaching and research (including digital solutions) in partnership with external partners.

Digital skills: Working with the Digital Strategy to support skills for teaching and research development programme.

Inform Research and Teaching Design: Lead and be involved in technical aspects of research and education projects to inform the design of studies, experiments and data capture.

Skills Development: Provide and deliver a portfolio of skills programmes to support our education and research community to develop.

Sustain

Future proofed solutions for growth and maintenance of sustainable facilities and equipment that delivers for research and education. Technical Strategy and Operations will **lead a coordinated strategic approach to sustaining our equipment and facilities** in collaboration with faculties. This is vital to sustain and grow our teaching and research ecosystem as they underpin our research outputs and impact on our student experience. We will also **lead on reproducibility and data quality for our research facilities** providing sector leading approaches.

This theme includes the core facility strategy and broadens the activities to include all of our equipment and facilities. We will lead on ensuring effective horizon scanning and effective mechanisms for sun-setting redundant equipment, critical to ensuring our laboratories continue to run efficiently and effectively. Mechanisms for funding, costing, pricing, resourcing, maintenance and effective asset management are all necessary to ensure that our equipment and facilities are appropriate and financially sustainable and suitable for the commercial market.
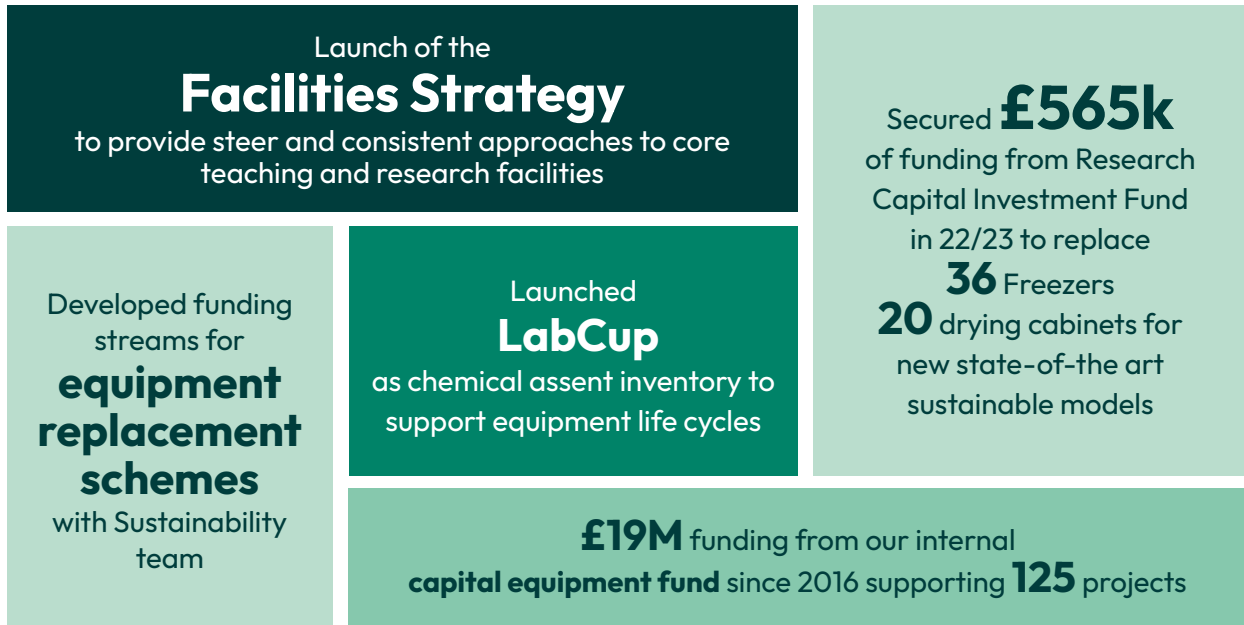
To date the approach to facilities and equipment has evolved as we have grown and responsive to individual sources of leveraged funds. This strategy will take a prioritised approach at an institutional level for maintaining all of our equipment and facilities in the most effective way (depending on the funding or cost recovery). We will also ensure that all our facilities are sector leading for our stakeholders and partners including a responsibility for reproducibility and data quality for all of our facilities.

We will also have a cross-cutting activity under this theme linked to environmental sustainability as a key driver to the approach to procurement, usage and maintenance of equipment and facilities.

Cross Cutting Activities	Interdependencies	Enablers
Research Environment	Facilities Strategy	Costing and Pricing policies
Research Culture	Faculty plans (E&R)	Effective marketing
Environmental Sustainability	External Funding	Partnerships
Student Experience		Cost recovery approaches
		BEI strategy

What have we achieved so far?

Launch of the
Facilities Strategy
to provide steer and consistent approaches to core teaching and research facilities

Secured **£565k**
of funding from Research Capital Investment Fund in 22/23 to replace
36 Freezers
20 drying cabinets for new state-of-the art sustainable models

Developed funding streams for
equipment replacement schemes
with Sustainability team

Launched
LabCup
as chemical assent inventory to support equipment life cycles

£19M funding from our internal **capital equipment fund** since 2016 supporting **125** projects

What will Exe-Tech 2030 Deliver?

☑ Coordination of strategic plans for equipment and facilities that match the teaching and research requirements of our faculty.

☑ Planned investment and funding supporting a strategic approach to bidding and spending (expenditure) for capital equipment funds and associated resourcing and maintenance.

☑ Effective funding mechanisms with linked costing and pricing strategies for the usage and maintenance of all our equipment and facilities leading to more sustainable resourcing of facilities and better cost recovery.

☑ Maximising funding opportunities through effective and planned approach to all institutional funding in a strategic way.

☑ Improvements in staff retention and skills enabled by effective funding models to reduce reliance on fixed term funding. This will also be achieved through our technicians commitment programme and the Exeter Professional review.

☑ Increased external investment from leveraging opportunities for philanthropic and industry/partner facilities and equipment.

How will Exe Tech 2030 be delivered?

Facility Strategy: Implementation of the facility strategy which will be an essential component to developing policies and practices that will incorporate equipment, facilities and laboratories more widely.

Innovation, Science and Facility spaces: Support the strategic development of the science park (and any commercial or facility spaces) so technical environments can be planned and allow for spaces on our campuses.

Review institutional equipment: Equipment will be reveiwed and supported at an institutional level where an institutional approach to purchasing and managing will be beneficial.

Coordination of all institutional capital equipment funding: (internally and externally) to ensure effective management of those funds to maximise usage to build equipment and facilities to match our institutional growth.

Planned priorities and horizon scanning: Informed Horizon scanning for new equipment working with departments and Funder Advisory Networks to prioritise (at an institutional level) capital funding where appropriate.

Data Integrity, compliance and ISO: Drive up the quality and reproducibility of data from our facilities for our stakeholders to improve outcomes ensuring compliant processes and appropriate ISO audit where necessary.

Nurture

We will **nurture our communities of technical experts to ensure capacity** across the University so that their invaluable and exceptional level of achievement can be rewarded and delivered in collaboration with the academic community and other professional services. We will lead, through these experts, on effectively managing and running laboratories and facilities and education in laboratory and field classes. The Technicians will be trained and empowered to focus on appropriate level work so they can play a vital role in the delivery of education and research projects and activities. The recognition of the expertise of the community and our ability to nurture that community in the ecosystem will be critical to the success of the Exe-tech strategy 2030. The community will be nurtured by taking a departmental view to the development of skills, training opportunities and personal development.

A consistent and planned programme of activities with effective communication and equal opportunities to access resources will be a key enabler to the strategy. This will also provide more effective career development through clearer and well-defined pathways working closely with the academic community and external bodies and funders to ensure the hybrid nature of some roles is also supported.

By improving research spaces and environments, we can also nurture our technical experts, which will enhance research culture (as well as teaching) and improve staff wellbeing, which will result in greater retention.

We will also work with national bodies and initiatives to develop recognition for the whole community more broadly and making improvements in EDI

Cross Cutting Activities	Interdependencies	Enablers
Research Environment	Facilities Strategy	HR policies
Research Culture	Faculty plans (E&R)	Career Pathways
Student Experience	Exeter Professional Review	
Technician Commitment		

What have we achieved so far?

2 rounds of
Technician Commitment
action plans completed

Over **£20k** invested in **training and development** opportunities in22/23

Recognition of **13** staff through
Technical Service Awards

30 members of technical staff progressed grades, **17** of whom went into management positions (June 2022 – June 2023)

7 staff supported to attend the **Herschel Programme** for Women Technical Leaders in 2023

Annual conferences now welcoming over **125** attendees across the South-West

4 trained
Professional Registration Mentors supporting staff in achieving recognition

Recognition of the work of technicians seen the **biggest improvement** over the last 3 years

2 apprentices in 22-23

What will Exe-Tech 2030 Deliver?

☑ Consistent technical staffing provision with a stable staffing profile within the technical services community providing consistent provision to faculties for teaching and research.

☑ Improved retention of experts critical to supporting student experience and improving research power.

☑ Improved wellbeing as staff are provided with greater support both by the institution and the sector creating a more effective team.

☑ The University strives to have an exceptional culture and reputation as a great place to work and the strategy will support this ambition for championing an outstanding research culture as well as a leading student experience.

☑ Better Equality, Diversity & Inclusion in a sector with poor EDI representation, the University will aim to lead for the technical community to celebrate and support EDI to enrich teams and outputs.

How will Exe Tech 2030 be delivered?

Technician Commitment Programme: Delivery of programmes of support for technicians providing better career pathways, greater levels of recognition and support for the community.

Culture Plans: Work with faculties and departments to ensure that the technical community is represented and included in cultural reviews and activities and wider community activities.

Promotion of EDI: Develop initiatives that promote EDI within the teams as well as working with external bodies to support EDI activities on a national level.

Wellbeing Support: Develop an inclusive, diverse and rich programme of support for wellbeing within the service and in partnership wider University initiatives.

Sector wide initiatives and policies: The challenges faced by technical experts as a community is being recognised at a national scale. We will work with external bodies and funders to influence and adopt changes in policy and practice to support and nurture our experts.
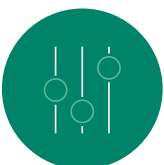
Resource allocation and funding: Review funding models and resource allocation for technical provision to reduce the number of fixed term contracts and seek mechanisms to provide more stable and sustainable funding models.

Objectives and Key Results

| Objective	Short Term (23/24)	Medium Term (Until July 27)	Longer term (2030)
❶ Strategic efficient technical roadmaps and action plans (for education and research) which is adaptable and aligned to need. Innovate Sustain	• Establish framework for roadmaps in line with faculty planning processes and start to build high level strategic faculty and facility plans that recognise growth and drive efficiencies.	• Technical roadmaps in place for faculties, departments and individual technical spaces with a process in place for review, monitor and adjustment because of changes in need, technological or digital developments.	• Delivery against the technical roadmaps and a process to monitor and review is built into annual planning.
❷ Readiness to adopt, develop and share expertise on new technologies and digital laboratory and workshop spaces. Innovate	• Design of digital skills training programme and mechanisms to Horizon scan new technologies gloablly in collaboration with academics. • Establish new technical teaching insights champions. • Work closely with the learning environments steering group to ensure alignment of activities/recommendations. • Establish and prioritise mechanisms for retaining research technicians. • Establish mechanisms for Horizon Scanning. • Identify global partners for effective strategic Horzion scanning. • Review Technicians contribution to teaching and skills sharing, identifying any gaps	• Delivery of digital skills training programme and mechanisms to Horizon scan new technologies. • Establish expert group to inform of new technical teaching insights. • A coordinated resource allocation for teaching from technicians with a clear plan of technicians contributions to fill skills gaps.	• Ensure digital skills training programme and mechanisms to Horizon scan new technologies is reviewed and refreshed annually. • Expertise in new technical teaching insights responding to changes in teaching pedagogy. • A strategic and prioritised approach to equipment and facilities. • Expert teaching and upskilling provision from technical staff.
❸ Improvements in cost recovery, commercialisation of facilities and financial sustainability of equipment. Sustain	• Develop governance of the facilities strategy and implement any recommendations of the advisory and management committees. • Develop a model to enable commercial opportunities. • Establish framework for planning financial sustainability of facilities and equipment. • Establish mechanism for institutional oversight of the University's equipment and facilities.	• Continue to Implement the recommendations from the facilities strategy governance. • Implement a model for commercial opportunities demonstrating a growth in commercial income from University facilities. • Improved cost recovery of research facilities. • Clear process and models in place for financial stability of equipment. • Lead a coordinated plan for new equipment and facilities.	• Facility strategy delivering improvements on cost recovery, commercialisation and financial sustainability in line with other Russell Group University's. • Clear commercial routes for facilities and equipment. • Delivery of coordinated plans for new equipment and facilities.

Objective	Short Term (23/24)	Medium Term (Until July 27)	Longer term (2030)
❹ **Contributing to University NetZero targets and sector leading in lab sustainability.** Innovate Sustain	• Establish programme of sustainability initiatives within laboratories and research spaces as part of the University's broader sustainability programmes. • Formalise a group of sustainability champions and advocates within laboratories and research spaces. • Establish mechanisms for supporting behavioural change within technical spaces. • Undergo an institutional freezer review.	• Review and evidence sustainability initiatives and roll out effective interventions across technical spaces. • Expansion of sustainability champions and advocates. • Begin engagement of sustainable practices with technicians, academic and student lab users to support behavioural changes. • Establish mechanisms for quantifying contribution to University NetZero targets within technical spaces. • Identify equipment for review at an institutional level. • Implement outcomes of freezer review and freezer management policy.	• Adoption of effective sustainability initiatives within technical spaces. • An engaged and active group of environmental champions in technical spaces. • Adoption of initiatives across academic, technical and student groups. • A clear plan of equipment review with an environmental sustainability lens. • Review outcomes of freezer review and monitor implantation of freezer management policy.
❺ **Increase Regional, National and International reputation for technicians.** Nurture	• Active membership of relevant networks and a clear understanding of the size and breadth of reputation. • Establish plan for expanding networks. • Actively contribute to the GW4 networks for technicians and infrastructure. • Promote leadership on funding body boards and panels from technicians. • Establish recognition of Technicians on relevant research outputs and as research investigators. • Review international opportunities/networks for the technical community. • Identify global partners who can support Horzion scanning and to share best practice.	• A reputation for active engagement in relevant networks nationally. • Deliver plan for expanding networks. • Lead on delivering initiatives in GW4 networks. • Increase representation on funding body boards and panels for technicians. • Promote recognition of technicians on relevant research outputs and have examples of more research investigators from the technical community. • Develop plan for expansion of international networks and opportunities for the technical community. • Build global partner network to share resources and facilities as well as best practice.	• Established an active network across the University technical community nationally. • Demonstrable growth in networks. • Outputs from relevant GW4 networks. • Clear representation on funding body boards and panels for University of Exeter technicians. • Evidence of increased recognition of technicians on relevant research outputs and a community of research investigators as research leaders. • A footprint internationally in relevant networks.
❻ **Improvements in staff well-being, culture, retention of skills and expertise, EDI, recognition and reputation for high quality outputs.** Nurture	• Review and roll out the 3rd Technician Commitment programme. • Be a leading service for taking forward the outcomes of the Exeter Professional review. • Establish benchmarking for recognition and capturing outputs. • Establish benchmark for culture index, retention levels and EDI and key areas for focus for improvements. • Build leadership programme across technical community. • Continue to deliver opportunities for career development. • Establish data quality and reproducibility working group focussed on mechanisms for ensuring high quality outputs.	• Deliver and review a rolling programme supporting the Technician Commitment. • Established support programme as a result of the Exeter Professional Review. • Measurable evidence of improvements in recognition and outputs for technicians. • Improvements in culture index, retention levels and EDI for key areas. • Delivery of leadership programme. • Increases in career development opportunities. • Deliver on ensuring high quality outputs and increased reproducibility for our research facilities and equipment.	• Evidenced improvements from the rolling Technician Commitment programme. • Evidenced improvements as a result of the Exeter Professional Review group in place. • Technicians appropriately recognised for contributions. • Embedded changes that support culture index, retention levels and EDI for key areas. • Ongoing leadership programme across the technical community. • Established career development opportunities. • Embedded mechanisms for ensuring high quality outputs and increased reproducibility for our research facilities and equipment.

Appendix 2: Technical Strategy & Operations Organisation Chart
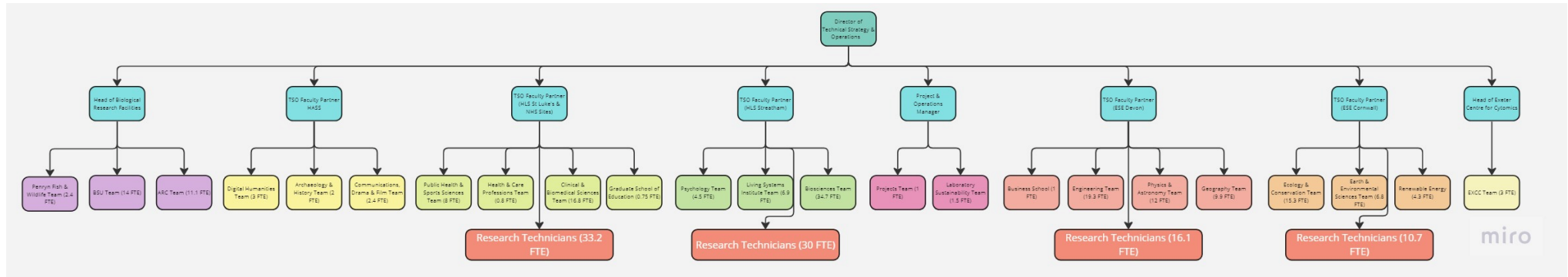
This chart is also available in full via Miro for ease of viewing: https://miro.com/app/board/uXjVOt-ufGY=/?moveToWidget=3458764568380346264&cot=14

Technical Services: Terms of Reference

Technician Commitment Working Group

What?

The Technician Commitment is a commitment made by the university to enhance the Career Development, Sustainability, Recognition and Visibility of technical staff. The working group's aim is to make continual progress against the university's action plan, to work cross-department and cross-service to implement these improvements.

When?

The group meets monthly to ensure continual progress, usually on the second Monday of the month.

Who?

Project & Operations Manager – Chair

Project Assistant – minutes & project support

Technicians from across the service:

- Steve Haley, Senior Technical Services Manager, Geography
- Sam Bailey, Technical Services Manager, Public Health & Sports Sciences & School of Education
- Annie Knight, LSRC Manager & Learning and Development Advisor
- Michael Worth, Laboratory Manager, Medical School
- Agnieszka Kaczmar, Assistant Laboratory Manager, Psychology
- Yasmin Ariqat, Assistant Laboratory Manager (Secondment), MRC Centre for Medical Mycology
- Fiona Rourke, Technical Manager, Creative Quadrant

Head of People Development

A Technical Services Faculty Partner

Director of Technical Services and Strategy

Governance

The group report back into the Technical Services Management Group.

The university's self-assessment and subsequent action plan is approved at UEB level.

Technician Commitment Action Plan 2021-2023

Theme	Objective	Actions	Progress
Visibility	Demonstrate and champion the value and contribution of our technical community to the academic endeavour	1. Improve our service-wide social media presence and use of online communities to champion our achievements and support one another	We have focused our efforts into improving our engagement on both LinkedIn and Twitter. We have gained nearly 400 followers on LinkedIn since setting up our page in November 2020. We have also increased our engagement on Twitter from an average of 0-1 impressions in early 2020 to an average of 23 impressions each day (October 2023) We also use a Technical Strategy & Operations 'Microsoft Teams' and related SharePoint page for collaboration and communication across the service, where colleagues will frequently share best practice, advice, equipment, and consumables with others. *"We have definitely made some achievements here e.g. more colleagues are posting on LinkedIn"*
		2. Initiate a programme of 'guest editors' for our Technical Strategy & Operations newsletter, from both the technical and academic community.	Over the last three years, Technical Strategy & Operations has released a monthly newsletter featuring guest articles from technicians, academics, and other non-technical staff too. You can read every one of our newsletters on our blog. *"Our newsletters are great – I really like the posts from tech staff across the service"*

		3. Develop 'Team Research' maps to highlight and publicise the contribution of technical staff to research outputs (as recently championed by the Chief Executive of UKRI)	In October 2023, the university published its first ever dedicated Attribution Policy. This document aims to define the University of Exeter's expectations around ensuring appropriate and fair attributions are given to all contributors to research, regardless of their relative status or position. It also aims to provide examples as to what contributions to the work constitute authorship or acknowledgement in the publication of research outputs. As part of the policy, we heavily encourage the use of the CASRAI CRediT Taxonomy as a way that team contributions can be effectively mapped. The policy is hosted alongside the rest of the university's research Codes and Policies. The Technician Commitment Working Group spearheaded the development of this policy. You can read the official press article here.
			TALENT Commission Mapping: • Encourage appropriate inclusion of technical staff as authors, co-authors, or contributors on published papers and presentations, including providing clear guidance for appropriate inclusion at relevant stages, and sharing examples of inclusion within newsletters etc. • Enable opportunities for technical staff to be considered as co-investigators, co-supervisors, for grants or projects
			"There are always highlights in the Tech Services and departmental newsletters (especially biosciences)"
		4. Encourage technical staff/teams to present at departmental seminar series.	Since 2021 we have hosted the Technical Lunch Seminar Series, organised and developed by Audrey Farbos (Senior Technician in Exeter Sequencing Facility), as an informal opportunity for all staff to network, share best practice, and learn new things. Each month there was a new speaker, they may have been a technical professional, an academic, from industry or from elsewhere in the institution. See the historic line up for the Technical Lunches on the website
			"The Technical Lunches are fantastic"

		"We're moving into Research Themes now which will give so much more opportunity for technical staff to present too"
	5. Through our matrix model of management and the Technical Strategy & Operations Academic Advisory Group ensure that local Technical Strategy & Operations delivery plans are aligned with college and university strategy.	Due to COVID and restructuring the Academic Advisory Group is no longer in place, however, we have developed the new Technical Strategy (See Appendix 1) which was written in full consultation with departments, faculties, directors, and all other stakeholders to ensure that our strategy and delivery plans all align and the full engagement of the academic community. In particular, the strategy sets out how we will work with faculties, departments and as individual labs to develop planned road maps which will be delivered in partnership with the Academic community *"This is happening through the Exe-Tech Strategy! It was nice to be able to provide feedback on the strategy before it was approved"*
	6. Sustain our Technical Strategy & Operations input at Open Days, outreach events and external events e.g. Big Bang Fair, New Scientist Live.	Due to COVID, many outreach events were cancelled until at least 2021, however, we have supported various outreach and external events since then. In 2023, Jade Furmston (Laboratory Manager) and Audrey Farbos (Senior Technician in the Exeter Sequencing Facility) spent 6 months working with the Science Museum on their Technicians: The David Sainsbury Gallery. This involved them visiting the Museum multiple times to take part in training sessions on facilitating workshops for young people aged 11-16. This work culminated in the production and delivery of these workshops to school cohorts in April. If you'd like to read more about Audrey's experience at the gallery you can read her article in our May newsletter. We also developed the volunteer roles of "Technical Service Advocates". Chantelle Davies (Laboratory Manager), volunteered throughout 2023 as an advocate for the pillar "Sustainability", and took part in various outreach events such as presenting at a career's day for year 9-11 students at Teignmouth School. You can read more about Chantelle's experience in our April newsletter. In March 2023, Raif Yuecel (Head of the Exeter Centre for Cytomics), Christian Hacker (Senior Experimental Officer, Bioimaging Centre) and Corin Liddle (Senior Research Technician), along with Medical Research Council Centre for Medical Mycology PhD candidates Alison Gifford and Emer

|			
			Hickey, spoke and exhibited at the Exeter College STEMM Career Fair at the Maths and Science Centre of the College. This was reported in our [March newsletter](#). A variety of our Research Facilities have also taken part in outreach events such as visits to Exeter College, or hosting trips, presentations, or work experience/internships. [Bioimaging Centre hosts Exeter College science teachers](#) [Biosciences and Research Facilities Host Exeter Scholars for an afternoon of talks and in lab demos](#) [Civil engineers from the Institution of Civil Engineers Exeter City Club visit VSimulators research facility](#) **TALENT Commission Mapping:** - Encourage and support events for visibility, outreach, and public engagement specifically for and/or including technical staff . Including e.g. showcase events, conferences, public engagement, open days, visits to local schools and colleges, T-level placements (in England), and work experience placements. *"I heard the Science Museum event went well"* *"I think Exeter's reputation is growing, through attending outreach events"*
Recognition	Mainstream achievements of technical staff and widely recognise their contribution to research and education	7. Work with the Director of Research Services and the Exeter Professional Steering Group to map potential development pathways and recognition for	The [Exeter Professional Career Framework Review Group](#) (EPCFRG) was established in 2022 to review the career and progression pathways for professional services colleagues. The group is currently in the final stages of the project, and we expect to soon see suggested improvements begin to take place. In addition to this review, the Technician Commitment Working Group have been considering what a technical career and development pathway may look like, we are working in stages in order to ensure that anything developed is in line with the overall University Strategy which will be agreed via the EPCFRG shortly. **Stage 1: Reviewing job titles** It was decided to review and standardise the job titles used across the service in order to: a) Minimise disparity across the service: Occasionally similar job roles across the service have ended up with wildly different names. This makes it harder to map the parity between the roles and muddies

		specialist technical roles.	routes of development. There were also instances of the same job title being used at different grades which makes it difficult to understand the expectations of those roles.

b) Bring the 'Technical' back in to 'Technical Strategy & Operations': While undertaking our benchmarking review *Research Culture: An Exeter Technician's Lens*, survey respondents raised how very few of our service job titles use the term 'Technician' or 'Technical', and that this might accidentally feed into the narrative that "Technician" is somehow an undesirable career path. We therefore decided to embrace the term 'Technical' which also allows us to be more inclusive of our non-STEMM based technicians.

c) To better reflect the actual responsibilities at each grade: it was felt that while roles had evolved over time our job titles hadn't.

This phase was completed in August 2023 when the Manager's Hub was updated with the approved job titles for the service at each respective grade. The expectation is that any new roles to the service will use these titles, with a later review of existing titles.
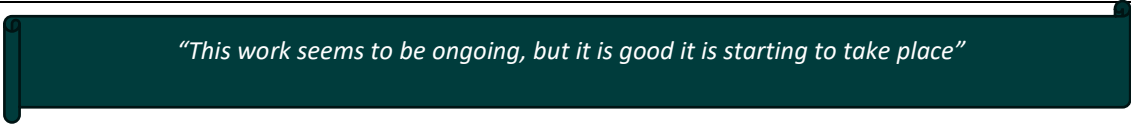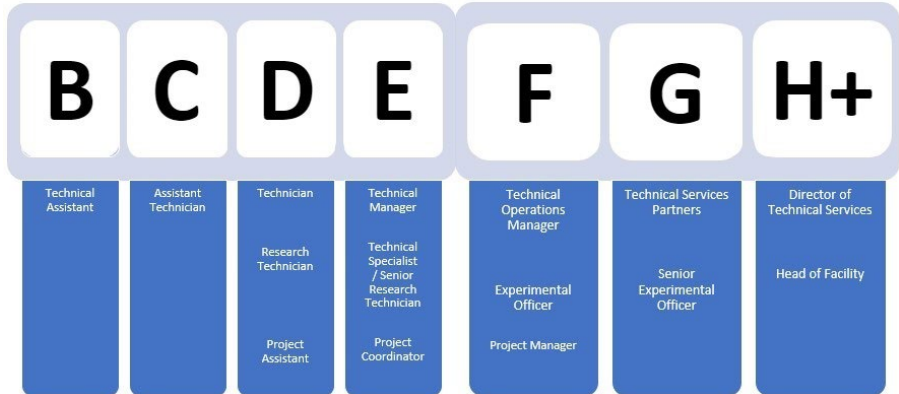

The diagram above has three separate distinct lines due to the recognition of the differing roles and responsibilities between "Core" and "Research" staff, and our centralised projects team. This will also enable us to more easily define career pathways under the next stages

We will also work with other Divisions to ensure those job titles and routes between professional job families can more easily be navigated to support career growth outside Technical Strategy and Operations

Stage 2: Review our standardised job descriptions

The Technician Commitment Working Group begun to review the service wide standardised job descriptions (Grades C - G) which were put in place in 2017. These required a review in order the ensure they were still relevant and reflective of the expectations at each grade. This review was completed with a few key principles:

a) A focus on competencies rather than specifics: We want to encourage the 'squiggly career' and recognise the wealth of skills which are gained through and required for a technical career.

b) Standardisation of language: In order to provide clear expectations of the responsibilities at each grade, the language used throughout is standardised but developed, for example, "An understand of the importance of health and safety" at B Grade is developed to "Familiarity with health and safety requirements for the technical environment" at D, and "In-depth knowledge of health and safety requirements for the technical environment, and the ability to write Risk Assessments and SOPs, and experience holding a health and safety role (BSO, RPS, PIC etc.)" at F Grade.

These standardised job descriptions are currently in HERA review, and when approved will be published on our Manager's Hub. As with the job titles, the expectation is that these new job descriptions will then be used going forward, with a future review to take place of existing roles.

Stage 3: Map potential training opportunities to the grades (From January 2024)

The next step in this process will be the mapping of available training and development opportunities at each relevant grade, alongside additional guidance and materials about how those opportunities can then be seized to support staff to the next stage in their careers. This can also be used to identify and address gaps in provision.

Stage 4: Review of existing roles (2024-2025)

It is proposed that with the introduction and adoption of the above standardisation that we systematically review each existing job role and description to ensure that everyone has an up to date and relevant job description, enabling them to navigate potential routes more easily for progression.

TALENT Commission Mapping:

- Consider piloting new opportunities for progression via Technical Specialist pathways, and/or provide opportunities and mechanisms for staff to move across career pathways and job families
- Ensure visibility of clearly defined career pathways and standardised job descriptions for technical roles and careers. Standardised job descriptions will likely have baseline commonalities, plus flexible opportunities for specialisation where needed. Ensure diverse inclusion of technical expertise during the process and any reviews thereof

			"This work seems to be ongoing, but it is good it is starting to take place"
		8. Work in partnership with the Director of Research Services to develop the University's research concordat in relation to research culture and recognition of technical staff on publications	The Technician Commitment Working Group is extremely proud of the publication of the Attribution Policy. With the publication of the policy, we aim to begin to improve our tracking and data collection of named outputs by technical staff so we can measure success. Technical Strategy & Operations now also has a representative on the Research Concordat Working Group. Annie Knight (LSRC Manager and Learning & Development Advisor) will be attending to ensure there is a technician's voice in response to the Concordat. Annie will be updating the Technician Commitment Working Group with progress and will enable better communication between the two groups. In addition, in January 2023 the Technician Commitment Working Group decided to undertake a benchmarking exercise after the publication of the Midlands Innovation (MI) Talent Report *Research Culture: A Technician's Lens* in September 2022, in order to identify if any of the key recommendations should be focused on at the University of Exeter. The outcome of this survey was our own report, *Research Culture: An Exeter Technician's Lens*. The report followed the methodology of the MI Talent report as closely as possible in order to provide comparable data. It concludes that the key issues surrounding research culture from a technician's perspective in Exeter are: accurate recognition of their work, a lack of clearly defined career pathways, being included in research culture improvement initiatives, inclusion at all stages of the research pipeline, and to a lesser extent, being better supported to apply for grants as Principal Investigator or Co-Investigator, and ensuring the role of technical staff in health and safety is supported and respected. An action plan has been created to help address some of the key recommendations from the report. The report is only published internally currently due to sensitive information detailed within, but if anyone is interested in further details regarding this report please contact techniciancommitment@exeter.ac.uk.

Research Culture:
An Exeter Technician's Lens
Benchmarking Report

University of Exeter

PROUD SUPPORTER OF THE
Technician Commitment

Report by the Technician Commitment Working Group   Published October 2023

TALENT Commission Mapping:

- Ensure considered inclusion of technical staff within all relevant communication channels and initiatives.

"The Research Culture report is so important and brilliant to see"

		9. Continue to highlight the achievements of technical staff through the University's Professional Service Awards, Teaching Awards, Impact Awards and Above and Beyond Scheme.	Technical Strategy & Operations are very proud of all our staff who received awards and recognition for their work over the last 3 years. Below are a few examples of some of our winners and runners up: Georgina Murray - Top Project Award 2023 Daniela Farina - Student Guild Award for Outstanding Performance 2022 Raif Yuecel & Paul Keatley - Papin Prizes runners up 2023 Daniela Farina - Green Gown Awards 2021 In 2022, our first conference after the COVID pandemic, we also established the Technical Strategy & Operations Awards, these were in 6 categories: Visibility, Recognition, Career Development, Sustainability, Environmental Sustainability, and Innovation. You can read about our winners here: 2022 Award winners 2023 Award Nominees booklet - You can read about the winners in June's newsletter Each year hundreds of technical staff are also recognised via Above and Beyond Awards. In 2022-23: 206 people received a "thank you", 254 people recieved a Bronze voucher award, and 9 people were recognised with a Silver award In 2023, the Professional Services Recognition Awards were relaunched. We are proud that 6 members of Technical Strategy & Operations were nominated by their colleagues to a huge range of categories: Respect, Environment & Sustainability, David Allen Hero of the Year, Excellence, and the Roddy Ross Award for Innovation. We are also incredibly proud of Daniela Farina, who won the Professional Services Recognition Award (Environment and Sustainability) 2023. You can watch her nomination video here
			TALENT Commission Mapping: • Review how staff contributions are recognised and rewarded at department- and institution-level, and whether inclusivity exists across all job families.
			"I know we had loads of staff nominated for awards like the PSRAs and Papin Prize"
		10. Support staff to achieve recognition in their field through professional	Unfortunately, due to workloads and other pressures around the COVID pandemic, we have made less progress regarding professional registration than we would have liked. We currently believe that only an estimated 5% of staff in Technical Strategy & Operations are registered, though at least 6% would definitely like to get registered and a further 3% are interested in finding out more. Our goal for 2024 is to work with those who have expressed an interest.

		accreditation and progression towards chartered status	We are Science Council Employer Champions, and we engage frequently with the Institute of Science and Technology (IST). We have an ongoing Professional Registration Scheme which agrees to pay the full costs of registration for the first year. We are also building our in-house Mentoring Scheme, who will soon be running workshops to get interested parties started. In addition, going forward we will be looking to support colleagues to register as Creative Practitioners with the IST where that is relevant, or to pursue Advance HE Fellowships. *"The Professional Registration Mentors appear to be putting on workshops which is good"*
Career Development	Support continuous professional development for technical staff and career progression	11. Advertise positions internally where possible to encourage progression for existing staff and provide mock interview opportunities and promote through TS all-staff meetings and in TS newsletter.	Throughout the COVID pandemic, Technical Strategy & Operations, like most departments across the university, established a policy of the internal advertisement of vacancies as priority for at least 2 weeks before an external advert was permitted. Following the relaxing of restrictions and 'return to normal', Technical Strategy & Operations have endeavoured to keep the policy of internal recruitment wherever possible. The Working Group have also developed processes for the sharing of internal vacancies on request, as well as highlighting all current vacancies in our monthly newsletter. In January 2022, we launched a process for staff to request a mock interview, or for a senior manager to review a job application before it was submitted. This was detailed in our newsletter and continues to be advertised under the 'Useful Links' category. **TALENT Commission Mapping** • Consider piloting new opportunities for progression via Technical Specialist pathways, and/or provide opportunities and mechanisms for staff to move across career pathways and job families. *"I did a mock interview and it was very useful. I got a new role shortly after"* *"It's really useful having all the vacancies listed in the newsletter"*
		12. Ensure that all reviewers have	PDR Reviewer training stats have increased from ~30% in 2020 to 75% in October 2023, and it continues to rise as more training dates become available. This was achieved through cascading communications reiterating the importance of attending this training and ensuring the provision of dates when there have been large amounts of people outstanding.

		undertaken PDR reviewer training to ensure quality of PDR for all staff.	Due to the removal of the university's ePDR system in 2021, the Working Group made the decision to create a service PDR template to help ensure they took place and to provide guidance to the conversation. Emma McArdle (Project & Operations Manager and Technician Commitment Lead) is currently taking part in an institutional PDR Review Group which is considering the entire PDR process and strategy at Exeter for everyone. They have chaired task and finish spin out groups from this in the development of what will be the new PDR form for Professional Services which will be published alongside the full outcomes of the group before Spring 2024. *"This was a great idea"*
		13. Facilitate job-shadowing of staff on higher grades and profile staff who have successfully progressed through the structure.	As described under action 27, job shadowing experience and guidance has been facilitated through the CPD Summer programme which provided 5 job shadowing opportunities across 3 disciplines and 4 grades in 2023. Job shadowing gives those looking to progress to the next step in their career the chance to experience life in a more senior role with someone who can give an insight into how they got there and advise on the steps to take to give the best opportunity for progression. We have published case studies of staff who have progressed through the structure on our website *"Yes! The shadowing opportunities this summer were great"*
		14. Develop a team of networking 'advocates' to work with the Technical Strategy & Operations project manager to identify conferences/events	The Technical Service Advocates scheme was launched in August 2022 and asks for volunteers to support various events and outreach opportunities under each pillar of the Commitment. In addition to the specific tasks undertaken by advocates, we also worked to improve access to attending conferences and events for all staff, through the publication of our Conference Attendance policy and a training/conference request form. Every member of staff who attends an event is asked to write a short newsletter article about their experience, so they can share best practice with the rest of the service. We are also proud to have a member of Technical Strategy & Operations sit on the Technical Council for the UK Institute of Technical Skills & Strategy (UKITSS). Ashish is continually reporting back to the

		to advertise to the wider service.	community on the discussions taking place, and to receive ideas and feedback for the council via our newsletters.
			TALENT Commission Mapping: • Support technical staff to contribute to and/or attend government events and initiatives to develop policy • Be inclusive of technical staff and their considerations in conversations on sector-policy developments *"I like how everyone is able to ask to attend conferences. It feels much fairer"*
		15. Work with our HR business partner to provide staff with guidance and transparency over performance targets required to achieve progression through contribution points.	In October 2022, the Working Group developed guidance, alongside our HR colleagues, on the HERA process and career progression in Technical Strategy & Operations. This aims to provide transparency to a process that is difficult to understand, and to collate resources in one place, with a Technical Strategy & Operations lens. Clear differentiation between the requirements at different grade boundaries and job roles along with the personal development to aim for in order to be ready for future roles have been proposed. This will come alongside our work under action 7. *"The guidance which was published was really useful, it's so hard to navigate what HERA means"*
		16. Invite staff from other universities to our Technical Strategy & Operations conference.	The Technical Strategy & Operations Conferences 2022 and 2023 were both fully open to anyone who wanted to attend, and we were glad to host technical colleagues from the University of Southampton, the University of Plymouth, and the University of Bristol. Following the 2023 conference, we were proud to host the inaugural meeting of the South/South West Technician Network, which was funded through the Technician Commitment Collaboration Fund. Here we met with colleagues from the University of Southampton, University of Plymouth, University of Bristol, Cardiff University, University of West England, and Bournemouth Arts University to discuss how we could establish a new geographical network to improve collaboration and knowledge exchange between our institutions.

			In addition, we have also hosted internship and work experience students at our conferences, as well as colleagues from other departments such as Health and Safety or Estates. You can read more about our conferences on our website and below is some feedback received from external visitors too.

"5 Stars – the conference had material that was suitable for external visitors as well as internal"

"Thanks for opening it up to techs too... I made some useful connections and so am grateful for that as it would be good for Plymouth/ Exeter to work more closely together in future."

"It was useful to meet peers from other universities"

17.

Conference attendees to report back to the wider TS community via our Technical Strategy & Operations newsletter and through short-briefing presentations at our all-staff meetings.

All staff who attend conferences or events are asked to prepare a short newsletter article on their experience in order to share what they have learned with others. Some examples of conferences attended are:

- The Technician Commitment Signatory Events
- The National Technician Development Centre Partner Forums
- Technician Partnership Conference 2022 (where Daniela Farina presented a workshop on Laboratory Sustainability)
- UK Technology Specialists
- IST Conference 2023
- Herschel Programme for women in Technical Leadership
- Microscience Microscopy Congress (MMC)
- International Society for the Advancement of Cytometry (ISAC) Conference
- UK Technology Specialists Network Meeting
- IST Conference 2022

TALENT Commission Mapping:

- Encourage and support events for visibility, outreach, and public engagement specifically for and/or including technical staff. Including e.g. showcase events, conferences, public engagement, open days, visits to local schools and colleges, T-level placements (in England), and work experience placements.

"I really like reading these pieces in the newsletter"

			18. Roll out newly developed training matrix (structured by role and grade) for (1) health & safety and (2) leadership & management.	In March 2022, the Technical Strategy & Operations Competency Matrix was officially launched. This system, built into Trent and the MI Hub, allows for each role within the service to be assigned various training requirements which allow that role to be fulfilled competently, and provides vital management information regarding compliance statistics. The matrix was designed to ensure that there was parity with training across grades where appropriate which helps to provide resilience across the service. Users can view their training requirements within the MI Hub, and then they can identify how to sign up to each course via our Training Hub. Their requirements can be downloaded as a PDF to help enable discussions with their line manager. Managers can view their entire team's matrices, so they can ensure their teams are compliant and also identify where any additional support may be required. The statistics across the whole service allow for more accurate financial planning and horizon scanning of needs to enable us to effectively manage our training budget.
				TALENT Commission Mapping: • Take a strategic approach to the sustainability of technical skills and careers, and appropriate succession planning through horizon scanning and identifying current and potential future skills gaps.
				"This has worked well showing people clearly what they need for their role"
			19. Allow structured time for staff to engage in CPD and actively provide peer-to-peer cover to allow individuals to 'find time'.	The Working Group established "CPD Summer" in Summer 2022 and organised a series of events through this in order to ensure individuals had time to dedicate to CPD – you can read more about this under action 27.
				TALENT Commission Mapping: • Ensure provision and protected time for training and professional development, supporting technical staff to take advantage of development opportunities, such as technical training, placements, and/or professional registration. Defi ne a minimum yearly allowance of days for technical staff to undertake professional development.
				"CPD Summer has been nice, it's a good reminder to spend some time on yourself"

		20. Improve PDR experience for research technicians by facilitating input in to the review from both academic and Technical Strategy & Operations reviewers.	As described <u>above</u>, the Technical Strategy & Operations PDR Template has guidance about the inclusion of any relevant matrix managers for all staff PDRs. The importance of including matrix managers will also be included in the new Professional Services PDR Form when it is developed through the PDR Review Group. *"This has worked well for those who have core technical teams in their locality. Maybe there's more we can do for other research techs who don't have as much community"*
		21. Widen our participation in national/international professional networks with particular focus on GW4ward.	Technical Strategy & Operations has active representation on three GW4 Groups: • GW4WARD • GW4 Research Infrastructure and Sustainability Steering Group • GW4 Talent & Skills As described <u>above</u>, we are also actively participating in the creation of new networks, including the online <u>UK Technician Network Discord Server</u> which was developed in collaboration with colleagues from various other UK institutions met through a Technician Commitment Signatory Event. We are also active members of both HEaTED and the National Technician Development Centre (NTDC).
			TALENT Commission Mapping: • Encourage formation of partnerships with organisations and initiatives that can provide technical training and wider technical networks. These partnerships can help to facilitate delivery of more technician-specific training across or within disciplines, and provide further opportunities for placements, secondments, equipment and knowledge exchange, and sharing of best practice. *"I have found HEaTED's training really useful"*
		22. Develop relationships and training opportunities with industry partners;	As described under <u>Visibility</u>, we have held monthly Technical Lunch Seminars with talks from both in-house speakers and industry. In addition, our Research Facilities have enabled many workshops with industry partners, most recently <u>Oxford Nanopore Technologies Day with Exeter Sequencing Facility</u>

		including on-site master classes and increased participation in industry technology webinars.	Our Technical Strategy & Operations Conference has each year been sponsored by commercial partners which has provided networking opportunities between technical managers and their key suppliers. *"The Technical Lunches were great, we should continue to do this with more industry partnerships"*
Sustainability	Develop our Technical Strategy & Operations talent pipeline and create resilience in our staffing structures	23. Develop our Technical Strategy & Operations 'People directory' to highlight individual skillsets so that others can request work-shadowing and training.	The People Directory was launched in early 2020 and is a tool to enable staff to find each other and forge connections. It allows individuals to upload their biography, describe the work that they do, and list their key skills. Users can also search the directory for people by name, location, job title, or skills. This enables them to reach out for training or advice to other skilled specialists across the service. The Working Group also published guidance alongside the directory about how to write a professional biography. The People Directory can be a powerful tool, and future endeavours are going to be made in embedding the use of the directory across the service to ensure it is as useful as it can be *"I really like the idea of the people directory, we need more engagement though to make it really worthwhile"*
		24. Build on the 'Pathways to Laboratories' programme to develop work placements for students in other disciplines.	The Pathways to Laboratory Scheme takes place each summer and provides an opportunity for students across all disciplines to gain valuable experience supporting one of the university's laboratories. You can find out more about the scheme on the website. In 2022, we enabled the provision of 8 internship places under this scheme, and in 2023 we enabled 10 places cross both Cornwall and Devon. We hope to build on this in future years. You can read about the experience of our lab managers and interns in our June newsletter. We have also been working with the Professional Services Divisional Director Leadership Team in order to establish how T-Levels may best be supported at Exeter for both our own division and others. **TALENT Commission Mapping:** • Expand entry routes to technical roles and careers by encouraging applicants from both vocational pathways and academic pathways. *"This has been a huge success in Geography, though it is a lot of work for the managers"*

			"It's been really nice to read about these in the newsletters"
	25. Broaden our engagement with apprenticeship programmes to ensure our future leadership and management capacity e.g. enrolment of senior technical staff in the University's MBA programme.	Over the last few years, Technical Strategy & Operations has enabled three staff to attend Level 3 Leadership Programmes, three staff to attend Level 5 Leadership Programmes, and one person to complete a Level 6 Chartered Manager Apprenticeship. In addition, in 2023 we supported 4 women to attend the Herschel Programme for Women in Technical Leadership. Jade Furmston (Laboratory Manager), Joana Zaragoza-Castells (Laboratory Manager), Steph Ralph (Laboratory Manager) and Kathryn Shears (Assistant Laboratory Manager) took part in the 6-month course and each agreed it was "extremely fulfilling" and "an amazing opportunity". You can read more about their experience in our Summer 2023 newsletter. Technical Strategy & Operations has also supported the attendance of staff to AdvanceHE's Aurora Programme, HEaTED's Technicians Stepping Into Leadership and Management and, Leadership and Management Skills for Technical Staff among others.	

TALENT Commission Mapping:
- Invest in apprentices and trainee technician positions, hosting placements for qualifications (e.g. T-Levels in England) and work experience placements for local schools and colleges
- Utilise the Apprenticeship Levy for training and developing technical staff

"My experience with the Herschel Programme for Women in Technical Leadership was extremely fulfilling."

"The Level 5 Leadership Programme has given more confidence and the tools to address larger operational management than I have handled in the past"

	26. Establish an annual Technical Strategy & Operations Innovation Award to	As described under action 9, the Innovation Award was established in 2022. *"I love the Tech awards, it was really nice this year to be able to nominate colleagues too"*

		recognise that innovation (in techniques and ways of working) will be key to our future sustainability.	
		27. Establish a Technical Strategy & Operations 'summer school' to encourage cross-facility skills transfer and networking.	In Summer 2022, the Technician Commitment Working Group established "CPD Summer". The purpose of this was to dedicate various days over the course of July and August to training and development, as this is generally a quieter time of the year. An example of the events which have taken place over the course of Summer 2022 and 2023 include: • A workshop on apprenticeships, • lab spillages training, • work shadowing for a variety of roles, • tours of research facilities, • gas and liquid nitrogen training, • the introduction of dedicated 'no meeting' days for both wellbeing and also the provision of time to put to training. Alongside this, the Working Group also published guidance on Job Shadowing as well as clearer guidance on how to request to attend Training or Conferences. **TALENT Commission Mapping:** • Ensure provision and protected time for training and professional development, supporting technical staff to take advantage of development opportunities, such as technical training, placements, and/or professional registration. Define a minimum yearly allowance of days for technical staff to undertake professional development. *"It's been hard since COVID, but I really liked the CPD Summer activities, and also the tours as part of our conferences to see other Facilities. I hope this grows in the future."*

TALENT Commission Report

The following actions are ones which have not been directly mapped to a Technician Commitment action above, however, we have identified these below and any actions we have taken against these, or processes which might have already been in place.

Action	Progress
Work to address any equality, diversity, and inclusivity considerations for technical workforces through implementation of targeted technician-specific initiatives, and/or ensuring inclusion within wider all-staff initiatives such as those linked to Athena Swan and the Race Equality Charter. Acknowledge that workforce characteristics of technical communities are often not uniform (eg. reported differences by discipline area), with different approaches potentially needed for different communities	Technical staff have always been included and actively involved in departmental and institutional initiatives such as Athena Swan and the Race Equality Charter. In December 2022, we undertook an EDI benchmarking exercise against the EDI data included within the TALENT Commission Report, to understand where Exeter sat and which areas might require further focus. This report will be repeated annually to better understand trends and movements to help keep any actions relevant and to measure any progress.
Provide transparent guidelines for how technical staff can be costed onto grants, sharing examples of best practice	This work is taking place with the Research Development Managers within the wider Research Services Division. TSO Faculty Partners are consulted on each new grant application to ensure that the technical provision requested is appropriate.
Support and/or deliver the collections, reporting, tracking, and analysis of data on employer- and sector-wide technical workforces. For HE institutions: we call on you to submit staff records to HESA for all your contracted technical staff. For all institutions; we call on you to track the size and make-up of your technical workforce	Due to being a centralised service, this data is already tracked across Technical Strategy & Operations. We have fed into the 2023 HESA Survey specifically advocating for the explicit inclusion and definition of technical staff.
Support the development and implementation of a new, simple, and fit-for-purpose classification for technical roles in higher education, research, and innovation at all levels, such as by creative a new job family specifically for technical roles, separate from academic, administrative, or any other job family	Technical Strategy & Operations has been a centralised service since 2015, recognising technical roles for the specialist family they are. The ongoing work regarding career pathways will help to flesh this work out further.

Appoint an institutional strategic lead e.g. Director of Technical Skills	From 2015-2022 this role was fulfilled by the Head of Technical Services. Since 2022, the Director of Technical Strategy & Operations has been in post. The post has directly led to the development of the Exe-Tech Strategy 2030.
Ensure inclusion of technical staff and/or technical expertise within end-to-end recruitment processes when hiring for technical roles. This should include utilising technical expertise when compiling role profiles, advice on where to advertise, and technical input on recruitment panels	Technical staff are always included at the heart of technical recruitment, due to our being a centralised service. The usually means that a technical member of staff is the recruiting manager, however even in instances where academics still line manage technical staff (such as Research Technicians), technical expertise is always included in the recruitment process from a local technical manager or a TSO Faculty Partner.
Ensure representation of technical staff on department-, faculty-, and institution-level decision-making committees, boards, panels, and similar groups, through either a dedicated seat or designated technical advocates within senior leadership and/or existing members. This includes processes and committees to develop institution-wide strategies and long-term goals.	Overall, we have good representation of technical staff at committees at all levels of the institution. Departmentally and divisionally, we have representation on various health and safety committees, either general or more specific in nature (such as the GMO Committee). The management team also share a variety of more senior committees to ensure technical representation too, such as Exeter Professional, Compliance Committee, Research Impact Executive Committee, Funding Advisory Networks, the Institutional Capital Award Fund Committee, the Research Facilities Advisory Committee and Management Committee, among others. While we realise we do this well especially regarding health and safety, we feel there is more work we can do to ensure inclusion at all levels for culture based committees such as Research Culture committees, and so we will be ensuring this takes place going forward.

Technician Commitment Action Plan 2024-2026

Theme	Action	Timeline	Impact Measured How?	Resource Required
Visibility	Develop and embed strong visual identities for each service for both digital and physical spaces	July 2024	• Sub-branding in place for all services	• Budget for design studio c.£252 per day's work
	Develop 'Who We Are' campaigns which highlight local technical professionals and teams and what they do	July 2024	• Improved understanding of service delivery from wider community • Survey before and after focused on understanding of what technicians do.	• Minimal stationery/ printing costs • Time and training on writing bios • Potentially, photography costs
	Ensure technical specialists are included in relevant departmental/faculty/institutional working groups or committees	March 2024	• Clear records of relevant memberships across all identified committees	• Time and volunteers for the committees

Visibility
Recognition
Career Development
Sustainability

Improve the understanding of what a 'technical professional' is across the institution	December 2026	• Improved understanding of service delivery from wider community • Survey before and after focused on understanding of what technicians do.	• Time dedicated to awareness campaign
Introduce Technical Champions from other areas e.g. Academic or wider Professional Services	September 2024	• Identifiable Champions across different departments in place and active	• Time dedicated from the individual Champions
Ensure that each team has regular and effective communication channels to ensure that information flows reach all staff.	March 2024	• Mapping of communication channels among services • Improved understanding and acknowledgement of work which has taken place	• Time required to unpick what happens currently and how to improve
Continue to enable the active participation of technical professionals in external conferences and events, encouraging staff to speak and present on their specialism where appropriate	December 2026	• Production of regularly updated list of conferences and events, including feedback from attendees for newsletters and articles	• Use of service training & development budgets to support attendance at external events

Recognition				
	Develop clear and detailed development pathways for technical professionals, including recognition of hybrid roles	December 2025	• Production of development pathway documentation and guidance • Establishment of official 'hybrid' roles	• Time required for the development of documentation • Potential resource implication to service budgets for hybrid roles
	Continue to encourage, support, and nominate staff to both internal and external award schemes	December 2026	• Statistics on staff members who are nominated for or win award schemes – including case studies on their work	• None required
	Improve the data collection and tracking of research outputs by technical staff, and provide clear guidance and training as to expectations and methods of tracking (eg. Symplectic Elements)	September 2024	• A better understanding of outputs by technical staff including direct statistics for authorship or acknowledgements • Improved knowledge across the services on the systems used (eg. Symplectic) captured via survey	• Time required for training on systems
	Continue to enable and support access to professional registration, including engaging with AdvanceHE fellowships and creative practitioners' registration	December 2026	• More staff registered with a professional body • A wider understanding of what bodies are available and what the benefits of registration are (captured via survey before/after)	• Funding through University of Exeter operational budgets for staff's first year as per our Professional Registration Scheme (potential for collaboration with GW4). • Time required to support workshops and mentoring schemes
	Ensure that research outputs or key projects that technical professionals have been involved in are highlighted as part of team, lab, departmental, or other 'meet the team' campaigns	July 2025	• Greater understanding of the work technicians do (captured via survey before/after)	• Time dedicated to ensuring bios are kept up to date

Career Development				
Develop training and guidance on how technical staff can turn the things they've done into unique selling points and examples in applications and at interview	July 2024	• Staff feeling fully supported to apply for and achieve higher grade roles	• Time required to develop training and guidance facilitated through existing training budgets • Potential use of external training schemes requiring budget	
Work with Faculties to enable the provision and support of post-graduate programmes for technical staff	December 2026	• The establishment of post-graduate opportunities for technical staff	• Allocating existing funding specifically for Technical Scholarships • Time dedicated to policy making • Support and training for line managers to ensure team workload isn't impacted	
Establish a range of wellbeing-led initiatives to support the provision of time to dedicate to Continuing Professional Development (CPD), or to reduce stress and workload among the services	March 2024	• Establishment of guidance to support 'freeing up time' (e.g. Meeting Free Fridays, or 1 day a month each etc.) • Promotion of concise and efficient comms including guidance on which channels to use in which instances (Delay Sending, "For Info/Action" instructions etc.) • A survey of stress and wellbeing across the services	• Support for providing cover across departments to enable the freeing up of time • Time dedicated to the creation and collation of advice and guidance	
Support staff to lead on the development of their own research grant applications, where appropriate	December 2026	• Statistics gathered on number of technical staff both as co-investigators and primary investigators on research applications	• Time required to develop policy and training • Potential resource implications for support if a member of staff's time is split	
Ensure a parity of experience and opportunity for all staff regardless of campus location	July 2024	• Survey of staff both before and after	• Time dedicated to understanding the feelings of disparity	
Actively engage in the university's Leadership Landscape training to ensure all managers are capable of supporting their staff	July 2025	• Most technical managers have received, or are due to embark on, the Leadership Landscape training. • Survey of technical staff before and after	• Time for managers to actively engage with the training courses.	

Visibility

Recognition

Career Development

Sustainability

Sustainability				
Sustainability	Build a strong network of 'Technical Advocates' to improve engagement with external and internal outreach events eg. career fairs	July 2024	• Statistics on engagement with outreach events	• Time to release advocates to attend events • Funding from training budgets to enable attendance
	Undertake an exercise to identify specialist skills across each service and develop roadmaps to enable successful succession planning and skill sharing	July 2025	• Improved understanding of specialist skills across the services • Development of succession maps	• Survey to detail skills & capability which would be undertaken internally but could also explore procurement from dedicated specialist technical development organisations (c£10k)
	Develop a clear 'training map' which details various development opportunities at every level and establish how the services support at each step e.g. T-Levels, Apprenticeships, MBAs, external programmes, PhDs etc.	December 2025	• Development of map and its use embedded into development conversations	• Time dedicated to the pulling together of existing resources
	Continue to engage and innovate in the area of environmental sustainability in all technical environments through the leading of grass-roots pilot projects, sharing best practice, and establishment of high standards.	December 2026	• Achievement of 100% Gold Laboratory Efficiency Assessment Framework (LEAF) accreditation in all relevant spaces • Capturing of statistics on the carbon impact of processes undertaken, and the tracking of improvements • Case studies on projects undertaken to improve sustainable practices	• Funding required for the development of pilot projects • Time dedicated to capturing the impact of work
	Develop opportunities for technical teams to hold cross-departmental and cross-silo networking events eg. coffee mornings or themed seminars	March 2024	• A collation of information and feedback on events taking place whether they are departmental catch-ups or seminars • Survey capturing effectiveness of such events before and after	• Funding required for hospitality • Time dedicated to organisation of events.