

## Pathway 2 – Movement and Progression

### Background

There have been a number of instances where Pathway 2 staff and/or Research Staff Representatives have raised concerns over the opportunities for research staff to progress through Pathway 2 including when moving from one grant to another within the University. Examples include

- Being required to start at the bottom of the scale for the new role
- The new role allowing no progression to the next level
- Named researchers not being costed as progressing to the next level in fEC

### Review

Given the University's commitment to support research staff development, the Research Staff Working Party has put together the following guide for grant applicants, with input from HR and Finance. Its aim is to ensure that research staffs' career pathway is considered at the time of grant applications, and that grant costings take this into account appropriately.

### Outcomes

The key features of Pathway 2 are set out at:

<http://www.bristol.ac.uk/hr/grading/academic/pathways/pathway2.html>

- A formal career pathway exists such that “[movement](#)” is possible from level a to b and “[progression](#)” is possible from level b to c and from level c to d1.
- Progress up the Career pathway must be based not only on the individual meeting the expected duties of the next role profile but also on the need for work to be undertaken at that level.
- Movement to role profile b may occur when the Head of School, with the Dean's authorisation, recommends to HR that the individual is ready to move to role profile b and that there is a role available at the level. There is no right of progression to level b.
- Staff who have four years' postdoctoral experience will normally be appointed at / moved to level b, provided that the Head of School and Dean deem they have the relevant skills and experience, and are fulfilling requirements of a level consistent with the profile at level b.
- When roles at level b and c are recruited, consideration should be given to whether the role will be progressable, and the maximum level to which it is expected to progress. This will need to be clearly stated in the further particulars and the individual's contract of employment. See information on determining the progressability of a role at:  
<http://www.bristol.ac.uk/hr/grading/academic/movement/determine-prog.html>
- In some cases, there will be an ongoing need for work only at the level to which the role will be appointed – in which case it should be made clear that there will be no “progressability” in the role. However, the issue of progressability should always be considered when making an appointment.

The fEC tool provides the option to cost for a named individual or for a role. In cases where the individual is in a role that progresses from one profile to the next the tool will correctly cost them. Where the role that they are in does not progress the tool, when linked to the named individual, will only cost to the top of the current role profile. It is possible to include a named individual on a grant and allow them to progress to the next profile by completing the fEC tool using the new staff option, adding the individual's name and grade and ticking the progressable role box (see over).

| No. | Scenario   | PI to Consider  | fEC Tool   | Pathway 2 Staff to consider  |
|-----|--|---|--|--|
| 1   | <p>Project requires a Pathway 2 member of staff to undertake the work involved.</p> <p>There is a named candidate for this role.</p> <p>The role requirements are such that there is scope to offer progressability (or the expectation of movement if the role is at level a)</p> | <p>Consider what work the role will be undertaking and determine the applicable role profile.</p> <p>Consider the named candidate and, what role profile they are currently working on.</p> <p>Consider whether the roleholder should be appointed:</p> <ul style="list-style-type: none"> <li>At the same role profile level, with scope to progress (or with the expectation of movement if the role is at level a) at some point within the project</li> <li>At the next role profile level</li> </ul> <p>Ensure that all relevant procedures are in place to reflect that decision at the appropriate time.</p> | <p>Where the post will be at the new profile for the whole duration of the project:-</p> <p>Cost the role as a new role, insert the individual's name and select the anticipated grade for the project.</p> <p>Where the post is at the same profile level with scope to progress (or expectation of movement if the role is at level a):-</p> <p>Cost the role as a new role, insert the individual's name and select the individual's grade and increment point at the planned project start date and ensure that the progressable role button is yes*.</p> <p>* Although level a roles are not subject to the "progression" process, they may be eligible for "movement" and selecting the progressable role button will provide the finance for any subsequent 'movement' from level a to b.</p> | <p>Ensure that the PI is aware of what grade and increment you currently are on so that career progression is considered when making applications.</p> |

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|---|---|--|---|---|
| 2 | <p>Project requires a Pathway 2 member of staff to undertake the work involved.</p> <p>There is a named candidate for this role.</p> <p>The role required and the individual's current role profile match and there is <i>no scope</i> for the requirements of the role to increase over the course of the project.</p> | <p>Consider what work the role will be undertaking and determine the applicable role profile.</p> <p>Consider the named candidate and, what role profile are they currently working at.</p>  | <p>Cost the role as a named individual. This will then take account of the individual's specific position on the scale and calculate their cost on this basis.</p>  | <p>The project requires a role at your current grade and you have been named as a staff member for the project.</p> <p>In this instance you will continue to receive increments up to the top of the role</p> <p>You would be able to move to the next role profile only by applying for a different role.</p>  |
| 3 | <p>Project requires a Pathway 2 member of staff to undertake the work involved.</p> <p>There is no preferred candidate for this role.</p>   | <p>Consider what work the role will be undertaking and determine the applicable role profile.</p> <p>Where the grant is for a duration of 4 years or more consideration should be given to whether the role profile will change during the duration of the grant.</p> <p>If at role profile b or c it is important to consider whether the role will be progressable at the earliest stage of establishing the role.</p> | <p>Cost the role as a new role, select the relevant grade.</p> <p>If the role is (or is likely to be) progressable ensure that the progressable role button is yes*.</p> <p>* Although level a roles are not subject to the "progression" process, they may be eligible for "movement" and selecting the progressable role button will provide the finance for any subsequent 'movement' from level a to b.</p> | <p>This is a new role. When applying for this role you will need to be able to demonstrate that you are suitable for the role.</p> <p>If you are currently employed and have the relevant experience then you should discuss the increment level you will be appointed to when you are offered the role.</p> <p>Funding for many projects is limited so if appointing at a higher level the PIs should explore whether funds can be transferred from other headings, whether alternative sources of funding can be identified to meet the shortfall, whether the funder will meet the additional costs of the more experienced researcher or, as a last resort, whether a shorter duration of contract funding has to be managed.</p> |

## **Key Points**

- It is important to consider the work that is required and determine the appropriate role profile.
- It is important to consider the career progression of Pathway 2 staff and provide opportunities for them to progress.
- There is no automatic right to progression, an appropriate role must be available for an individual to progress into.
- Funding should not determine the role profile or the level at which the individual is appointed (these should be based on the work to be undertaken and the experience of the candidates), however it may affect the level of funding available for the project and therefore a shorter duration of contract funding has to be managed.
- It is important to consider the parity across the School when making appointments.