**Promotion up to Senior Lecturer / Senior Research Fellow**

**Changing someone’s contractual status to enable promotion**

* This form is used for opening up an academic *Position* to be carried out at a higher grade, and therefore making it *possible* that an individual role-holder could then be promoted to fulfil that position at the higher grade
* Whilst the current role-holder’s skill and performance is likely to have been partly or significantly responsible for developing the position in practice, and making it capable of being discharged at a higher level, this form should focus on the position, the job, the tasks, the operational and strategic needs that the development of the *role* to a higher level meets, more than the person
* If you are seeking to both make a (not-contractually-expected) position promotable *and* promote the current role-holder, then the assessment of the *person’s* suitability is done as part of [Promotion up to Senior Lecturer / Senior Research Fellow](https://www.bristol.ac.uk/media-library/sites/hr/documents/academic-progression/promotion-sl-srf.pdf)
* Otherwise, this form can be completed at any time ahead of any planned promotion application
* Do not use this form in relation to [Promotion to Professor](http://www.bristol.ac.uk/hr/policies/promotion/)
* This form should be a **maximum of 2 pages of A4**

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| Name of Current Role-Holder: |  | | Faculty: | Choose an item. |
| Position (Current Job Title): |  | | ERP Resource ID: |  |
| School/Section: |  | | ERP Position ID: |  |
| Line Manager Name: |  | | | |
| Current level/ Grade of role (i.e. a/I, b/J or c/K): | Choose an item. | Pathway of role (2 or 3): | | Choose an item. |
| Make promotable up to new level/ Grade (i.e. b/J, c/K or d1/L)\*: | Choose an item. | Budget code (for higher grade position if successful): | |  |

\* Note that the process only allows promotion one level/grade at a time

**Management Business Case for Making Position Promotable**

Please provide brief comments under each heading.

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| *Key strategic or operational reason for making Position a higher grade:*  … |
| *Availability and examples of higher-level duties consistent with higher level/grade and* [*role profile*](http://bristol.ac.uk/hr/grading/academic/role-profiles/)*:*  … |
| *Examples of current lower-grade duties that have been/will be reduced or ceased, or which have been/will be delegated to junior team members, to free up the capacity of current role-holder to deliver higher-grade duties:*  … |
| *Assessment that the role is unique rather than generic (i.e. there are not several people in the same capped-position situation in the same subject/discipline, in which case there should be a pool for an advertised vacancy):*  … |
| *Confirmation of the source and availability of funding to support upgrade of position (in the case of applicants on Pathway 2, please confirm that you have checked funding availability with Finance regarding your grants):*  … |

**Role-holder’s agreement for their position to become contractually expected to apply for Promotion**

Converting a position to ‘promotable’ sets a new *contractual* expectation that the current role-holder will now apply for and achieve promotion at a reasonable, planned date in the future. Please therefore confirm below you have met with and discussed this process with the individual and the planned promotion is agreed as achievable. Note that, with the University-wide move to promotion at a time of individual readiness, there is no longer one contractual date upon which promotion is expected but rather a window of up to a maximum of six years within the grade in a promotable position.

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| Date(s) of meeting/discussion held: |  | |
| Key points of discussion, issues or queries discussed:  *This might, for example, be what the individual has yet to do in terms of CREATE completion, or other qualifications (such as PhD), training or development before readiness.*  *Note that Pathway 1 and Pathway 3 staff without a teaching in HE qualification and seeking promotion to Senior Lecturer should achieve their Fellowship through the University’s* [*CREATE scheme*](http://www.bristol.ac.uk/bilt/staff-development/) *before applying. See the* [*Policy for staff participation in the CREATE scheme*](http://www.bristol.ac.uk/hr/policies/create-policy/) *for further information. Alternative teaching in HE qualifications include a Postgraduate Certificate in teaching in UK HE, or the Health Professionals Education programme.* |  | |
| Informally agreed date (month/year) that the individual will aim to apply for promotion:  *(which* may *be at the same time as this change to their contractual status)* | |  |
| Confirmation that the current role-holder understands that by opening this position to being promotable to a higher grade, they will now be contractually expected to successfully achieve that promotion within a maximum of six years of having been appointed to their current grade: | | Yes/No |

**School Approvals**

This form should be submitted by the relevant manager to their Head of School for final approval (which will need to be by the same deadline as the role-holder for submitting their CV and case-form if they are also applying for Promotion – refer to Appendix A in the [Promotion up to SL/SRF procedure](https://www.bristol.ac.uk/media-library/sites/hr/documents/academic-progression/promotion-sl-srf.pdf) for the timing).

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| **Manager Name:** |  |
| *Signed:*  *Attachment to an email will constitute signatory* *authorisation* ***and that funding is available for the role holder to be promoted.*** | Date: |
| **Head of School Name:** |  |
| Signed:  *Attachment to an email will constitute signatory authorisation* ***and that funding is available for the role holder to be promoted.*** | Date: |