Recruitment Toolkit: Questions to ask when planning your recruitment strategy – Draft example of a larger project

*This is a worked example for a research culture award. The grant was for £3 million and across three institutions. Fourteen roles were funded by the award, spread across the three institutions. The award was for two years funding, but in-kind contributions from partners added a 12-month lead in and 6-month exit period.*

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| What do I need to achieve in the short and long term?  |
| Goal | Timescale |
| *Create a new leadership model based on the views and experiences of all roles in the research system across three institutions.* | * Commences in month minus 6 (part of in-kind aspect, so not funded).
* Evaluation begins in month 1.
* Runs through project.
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| *Establish and manage a flexible innovation fund to support new ideas.* | * Fund promotion commences in month minus 12 (part of in-kind aspect, so not funded).
* First call month 2.
* Second call month 7.
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| *Create a knowledge hub to provide pre- and post-award support, evaluation, development programmes and knowledge sharing.* | * Awareness building for Hub commences in month minus 12 (part of in-kind aspect, so not funded).
* Hub activities begin in month 1.
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| *Sustainably embed the best of the project’s outcomes into the three institutions and provide a foundation for future work.* | * Awareness building of likely outcomes (based on initial funding awarded and leadership model) will begin from month 6 and inform the design of useable resources.
* Embedding will be mapped against internal processes to find opportunities to provide solutions (such as link to REF).
* Involvement of non-project funded staff will build sustainability so must inform activity from month minus 12.
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| *Improve institutional research culture.* | * Constant endeavour.
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| *Note: the first three aims are lifted directly from the proposal. The fourth connects this project with future activity. The fifth is a longer-term strategic aim that this work feeds into and is included as a reminder of longer-term “steering” aims which can be lost in the detail of projects.*  | *These timescales were agreed during proposal writing and included in the Gantt chart submitted with the Case for Support.* |
| Of the above goals, what can I do myself and what do I need help with? * Think about your own strengths and weaknesses, and your knowledge and skills base.
* Do you need to bring in new technical skills or do you want help with developing ideas and writing?
* What level of expertise do you need?
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| Myself | Help |
| Identify internal stakeholders. | OK on this, but make sure connected to all internal networks – visit them in pre-project period. |
| Recruit to 14 diverse roles. | Happy with knowledge to write Project Manager, Developers and Events job descriptions. Warn internal HR of the connectivity of posts so they go through systems in one batch (risk of them being disconnected and out of synch).Use existing roles as basis of new ones where possible to facilitate rapid grading in system.Will need help with evaluation and analysts:* Ask HR for similar job descriptions
* Ask internal “research on research” people for guidance
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| Align with internal and external priorities and work cycles. | Help from people who sit on high-level committees – need to seed ideas from the project at appropriate times and in right way. |
| Create engaging research and project outputs. | Help needed – talk to Comms Officers on other projects etc. about what to ask for in job descriptions as this function split across various roles. |
| Ensure three partners work at comparable pace and with sufficient consistency. | Regular meetings scheduled. |

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| What help is already available to me? e.g. collaborators, shared technical services, buying out time from existing staff |
| * Collaborators
* Senior Leadership (Executive level)
* Internal committees and forums
* HR
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| What funding streams are available to me, and what parameters or restrictions do they place on recruitment?e.g. types of roles, timescales, pool of applicants |
| Funding | Parameters/restrictions |
| In-kind existing staff time. | Must align with existing roles, risk of losing this if project aims grow apart from institutional priorities. Align these commitments with specific asks to avoid reduced commitment.  |
| 80% FEC for all posts. | Posts need to be approved for additional 20% from institution. Confirm cost centres and process for this ahead of job requisition. |
| In-kind new staff time. | Must align with value to institution. Clarify precise nature of these contributions to avoid confusion and reduced commitment.  |
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| Are there any other factors to consider? e.g. other stakeholders, requirements of your fellowship, employer requirements |
| Challenges of recruiting suitably qualified staff for unusual roles.Challenges of recruiting high quality administrative staff.Potential impact of matching existing pay scale if staff move across from other roles (mitigated in the bid by costing at mid-scale) (undermined by subsequent significant move of grade boundaries).Time taken to recruit through institutional processes can be up to 12 months.Potential to recruit at-risk staff enables much faster recruitment, but reduces likelihood of skills and experience match. |

# Deciding the specific roles

You may want to fill this in after you have completed ‘Describe the role’ found in the ‘Clarifying the role’ section of the Toolkit.

## Which types of roles do I want to recruit? – Postdoctoral Research Assistants/Associates, PGR students, technicians etc.

## How many people do I need?

## What do I specifically want them to do?

## How quickly do I want to expand, and in what order do I want to recruit these roles?

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| Role  | Purpose | Timescale | Order |
| Project Manager | * Develop and maintain project plan.
* Build strong relationships with all project members.
* Lead the organisation of consortium meetings and events (supported by Events Lead).
* Lead the preparation of reports to funders and other stakeholders.
* Support recruitment processes and capacity building.
 | Appoint with in-kind funding. Recruitment to commence in month minus 9, appointment around month minus 3. | 1 |
| Evaluation Manager | * Get some help with this – not an area of expertise and it’s a critical role.
* Design the support package for applicants to the Flexible Fund in collaboration with leadership developers and knowledge hub manager.
* Work with applicants and Funded Project Leads to **ensure project designs are finalised with robust evaluation and impact plans.**
* Design an evaluation strategy to create consistency and cross-connectivity across projects to amplify impact between similar projects.
 | Recruitment to commence in month minus 9, start date at start of project. | 2 |
| Finance Manager | * Create and manage complex financial systems which need to enable to flow of flexible funding across three institutions.
* Design an inclusive flexible fund governance and application process, mindful of the lack of experience of potential applicants.
* Ability to manage at least three (possibly more in devolved structures) financial systems.
* Live tracking of finances and reporting to project leadership team.
* Familiarity with financial management against funders terms and conditions.
 | Recruitment to commence in month minus 6, start date at start of project. | 3 |
| Institutional Project Coordinators (3) | * Communicate project outcomes in host institution and broadly across research and innovation communities.
* Oversee institutional activities and ensure connectivity with existing systems, processes and plans.
 | Recruitment to commence in months minus 9 to minus 6, start date at start of project. | In phase 2 and 3 (depends on institutional timescales for recruitment).  |
| Institutional Knowledge Analysts (3) | * Talk to HR and research on research community for detailed job description.
* Community Knowledge Analysts (CKA) will use themes emerging from the data to create an **integrated Collegial Research Leadership Framework (CRLF)**, combining it with existing empirical data, prior frameworks for research/academic leadership, and linking the formation of the CRLF to ongoing teams and projects across the three institutions.
* The CKAs and an Evaluation Manager (EM) will **establish, pilot and validate measures for collegiality** creating an open-access community resource bank.
 | Recruitment to commence in months minus 9 to minus 6, start date at start of project. | In phase 2 and 3 (depends on institutional timescales for recruitment).  |
| Institutional Leadership Developers (3) | * Develop and deliver leadership programme for all investigators funded through the flexible fund.
* Deliver the leadership recognition campaign.
* LDs will **test and develop the CRLF through a series of institutional consultation events** supported by the Events Lead (EL), inviting representatives from across the research ecosystem (all job families and role types). They will use the completed framework to **devise training packages** that enhance the awareness and practice of collegiality and to support consistency in the recognition and reward of collegiality through **development of calibration training for promotion panels.**
* Post-award, the CKM, the three LDs and the EM will provide **a comprehensive support package for all Funded Project Leaders** by (a) hosting a project launch event to connect awardees, and to provide an impact development workshop/surgery to finalise project design; (b) offering responsive support from the CKAs for targeted literature reviews and horizon scanning; and (c) **a bespoke leadership development programme**, devised by the LDs and the Leadership and Mentoring Consultant, and informed by best practice from the Future Leaders Fellows’ Development Network, and UofG’s ‘Talent Lab’ leadership development initiatives.
 | Recruitment to commence in months minus 9 to minus 6, start date at start of project. | In phase 2 and 3 (depends on institutional timescales for recruitment).  |
| Knowledge Hub Manager  | * A Community Knowledge Manager (CKM) will create links with key internal stakeholders in the partner universities through creation of a Culture Stakeholder Group, and work to **create routes to embedding collegiality measures within mechanisms for reward and recognition.**
* **Pre-award support** comprises information events/packs communicating aims, themes, and the requirements of the CCF and will be led by the CKM, the EL, and a specialist Evaluation Manager (EM) with support from the PCs.
* **A diverse and inclusive CCF Panel will be established** by the CKM, the EDI Consultant and the PCs.
* Post-award, the CKM, the three LDs and the EM will provide **a comprehensive support package for all Funded Project Leaders** by (a) hosting a project launch event to connect awardees, and to provide an impact development workshop/surgery to finalise project design; (b) offering responsive support from the CKAs for targeted literature reviews and horizon scanning; and (c) **a bespoke leadership development programme**, devised by the LDs and the Leadership and Mentoring Consultant, and informed by best practice from the Future Leaders Fellows’ Development Network, and UofG’s ‘Talent Lab’ leadership development initiatives.
* **Communication of project progress/outcomes** will be managed by the CKM, the EL and the PCs.
* Led by the CKM, the Hub will provide expert pre-award support (project design, evaluation design, data gathering, equality impact assessment, routes into impact) to CCF Applicants to ensure maximum value for the time and funding invested. The CKAs will work closely with key internal stakeholders at each institution to produce **short, focused, data or literature review projects that provide evidence, context or clarification** to support Applicants and/or the decisions of the CCF Panel. Hence, the CKAs will work to complement the efforts and our Funded Project Leaders to identify or verify trends in organisational data, and to **improve the impact of existing policies and tools** to create lasting change. The EM will provide review and tailored support to all Funded Project Leads to **ensure project designs are finalised with robust evaluation and impact plans.** This will also create consistency and cross-connectivity across projects to amplify impact between similar projects.
* CKM will bridge into existing institutional expertise by establishing a Culture Stakeholder Group of the key internal stakeholders in the partner universities and work with them to **create routes in to embedding change and creating impact in existing and upcoming plans and actions.**
* Ongoing management of project progress and outcomes will be managed by the OM, the CKM, and the PCs.
 | Recruitment to commence in months minus 9 to minus 6, start date at start of project. | In phase 2 and 3 (depends on institutional timescales for recruitment). |
| Events Lead | * **Pre-award support** comprises information events/packs communicating aims, themes, and the requirements of the CCF and will be led by the CKM, the EL, and a specialist Evaluation Manager (EM) with support from the PCs.
* **Communication of project progress/outcomes** will be managed by the CKM, the EL and the PCs.
 | Recruitment to commence in month minus 6, start date at start of project. | 3 |
| Institutional Leads | Strategic connection to institutional priorities.* Leadership and support to team.
* Provision of resources as required by project team.
 | Not recruited but risk of change of role. Be aware of potential to lose institutional leads and mitigate with succession plans. | Review regularly in team meetings. |

## How will the different roles interact with each other?

## Are there potential conflicting priorities or dependencies between the different roles (staff or student)? How will they be prevented or resolved?

## How will I ensure that I offer roles that are attractive to potential applicants?

## What are my contingencies if I fail to recruit first time?

* Check with Research Office about the terms of the grant and whether flexible staffing options (part-time buy out) are possible.
* Explore with funder the option of no-cost extension if start date has to be delayed to appoint best candidate (make a case).
* Ask people in similar fields to promote, especially to staff approaching contract end.
* (Remember no recruitment better than bad recruitment).
* Share the problem with colleagues – they may see solutions I can’t.

## Do I have the time and resources to support the career development of these people, at the same time as achieving what I need? How will I ensure this?

* Yes – built into the grant with funding for specialist training.
* “Onboarding” process for all new staff which explores career options and maps these against project opportunities.
* Model good practice around annual review and take it seriously.
* Explore peer mentoring in and beyond the team – look for similar roles on other projects and propose mutual support to other project leads.
* Encourage staff to find mentors – share network to make this happen. Be clear to mentee and mentor that focus of the relationship is the staff member not success of project.

## Who else do I need support from to make this happen?

* Talk to large project and network leads – ask Research Office who has done similar things. See if they will talk to me about the challenges and their “trade secrets”.
* Build familiarity and relationships with research enabling staff – research office, local and central HR, finance and comms. Talk through the project before it starts and before recruitment to check approach is effective and aligned with internal systems.