Guidance Notes for completing the PD33 and PD33A

This guidance, the PD33 form, and further information on Grading and Reward can be found at: http://www.admin.cam.ac.uk/offices/hr/grading/

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PD33

The following guidance relates to the full PD33. For information on completing the PD33 Clone/ Generic please see the PD33A section on page 22.

PART 1 - GRADING AND CATEGORISATION

This section contains the information required to set up, or maintain existing roles.

Section A - Role Details

1. Faculty/Department:

The full name of the Faculty or Department that will administer the role – this is not necessarily where the role will be physically located.

2. Role Code Number:

Only complete this section for existing roles. Grading and Reward allocate new roles with a Role Code Number.

The Role Code Number can be found in the CHRIS system, and is stored at the position level. To locate the Role Code Number (access to this will depend of your CHRIS permissions):

- Select the position
- Select “UDF Categories (Position)” from the “User defined forms” menu
- Select “Role Code Number (New)”
- Click “UDF Details (position)”
- The reference will be shown in the top half of the screen, check to ensure that the current Role Code Number is used (the entry with no end date showing).

3. Current grade:

Only complete this section for existing roles.

4. Grade sought:

Enter the grade sought for the role (if known).

5. Current position title:

Only complete this section for existing roles.

6. Proposed position title:

Enter the name the department would like this role to be known as. See the recruitment guidance for further information on naming of roles.

7. Preferred official title

Only complete this section if you wish to indicate the official title you would like for this role.

8. Reason for profile:

	Reason for Profile	When used
A	**Advice only (No Scoring)**	To receive advice on either the content, or likely outcome. This can be sent to Grading and Reward unsigned. Please also tick the type of request that the advice is being sought for.
B	**Temporary cover**	To cover an existing role, but with a variation to the duties required. If no change in duties is required please contact the HR New Appointments team for advice.
C	**New post - unique**	To create a new role where the content is significantly different from any other role within the department.
D	**New post – near clone**	To create a new role based on an existing PD33, but with some minor amendments made to the content in parts 2 or 3 of the PD33.
E	**Regrading request – filled post (rolling regrade)**	To request a review of the current grade in cases where the requirements of a role have changed over time, and are already being undertaken by the role holder, with the agreement of their line manager. See the How to apply for a regrade (Rolling regrade process) for further information. Leave section 8 (Effective date) blank, as the date is determined by when the fully signed form is received by Grading and Reward.
F	**Regrading request – filled post (re-organisation regrade)**	To request a review of the current grade in cases where the changes to the duties of the role are due to a re-organisation of duties, usually led by the department and occurring as a result of a specific event (combination of teams, removal of a vacant post, addition of new areas of work etc.).
G	**Regrading request – vacant Post**	To request a review of the current grade in cases where the role is/ or will be vacant as at the effective date given in section 8.
H	**Updating**	To change the content of the PD33, but where no change to the grade is anticipated. Grading and Reward will review the changes and confirm that no change to the grade is required.
I	**Align content to an existing role**	To amend the content of a PD33 to exactly match that of another existing role.(i.e. make it a clone of another role). Parts 2 and 3 can be completed by copying and pasting the content of the existing PD33. Role-holder(s) must sign part 4. Please also tick the request type that the advice is related to

9. Effective date:
This is the date from which the new role, or change to the existing role, will be implemented.

This applies to all request types, with the exception of "**Regrading request – filled post (rolling regrade)"** as the effective date for that is determined by the date the fully signed PD33 is received by Grading and Reward, for further information see the regrading policy.

10. Is this request due to a re-organisation?
Please indicate whether the creation of the new role, or the changes to an existing role are as the result of a re-organisation of duties/ roles within the department.

11. Basis:
Tick the relevant option. If the basis is felt to be incorrectly specified you will be contacted by Grading and Reward to discuss the matter.

Section B - Details of current occupant(s):

This section should include details of all positions affected by this change that have the same Role Code Number, whether filled or vacant. See the 'Role Code Number' section on page 2 for how to search on CHRIS for this information.

In situations where there are positions with the same Role Code Number, but which are not being affected by this change, do not include them in this section.

Position reference number	The position reference listed on CHRIS (this is either a 5 digit number, or an 8 digit number beginning with a 7)
Name of current role holder(s)	For filled posts list the first and last name of the current occupant(s) This should only include the names of people who will be employed as at the date given in section 8.
Date of Appointment to position (at current grade)	Enter the date that the employee started the current position (if the role has been regraded this should be the date the PD33 was last revised)

Section C - Additional administrative information

Pre-employment checks required

Please list all pre-employment checks that will be required by this role. The recruitment guidance on the Human Resources webpages contains further information on Pre-employment checks.

Line Manager Details

Line manager position reference number:
The position reference number of the line manager (this information will be used in the CHRIS hierarchy structure).
OR
Line manager's name:
The name of the person to which this role will report.

PART 2 - ROLE DESCRIPTION

For occupied positions part 2 should be completed by the line manager/role holder. In all other cases it should be completed by or on behalf of the head of institution.

Role Identification

Faculty/Department

The full name of the Faculty or Department that will administer the role.

Position title:

If an existing role, enter the current ‘Job Title’ (from CHRIS). Otherwise – enter the intended in-house (unofficial) title.

Role Code Number:

For existing roles, enter the Role Code Number (RCN).

Date of last revision:

Enter the FULL date of the last revision of the role description (i.e. the date on which you are writing this version) – this date must be changed whenever the role description is revised, for version control.

Dimensions of the Role

This section of the form asks for factual, quantitative information that will help to describe the scope of the role. It may be helpful to consider, where appropriate, financial and staffing figures, the number and type of relationships with other staff or departments or external organisations, or the variety of tasks undertaken. The following are examples of typical dimensions which may be relevant to a role:

Dimension	Examples
Staffing	Number and type of staff supervised, e.g. 4 technical staff
Financial	Size of recurrent budget – cost/turnover Numbers and size of grants and contracts
Customer	Number and type of internal and external customers
Operational	Range and type of activities and/or services provided

An example of appropriate dimensions for a technical role could be:

‘The role is part of a new research group within department x which already comprises ten other well established research groups. The role will play a crucial part in establishing the laboratory and co-ordinating processes for the group which comprises two postdoctoral researchers and two doctoral students. The group will have a budget of £456,000 per year covering a number of research grants.

Organisation Chart

The purpose of this section is to show how the role fits into the rest of the faculty/department/institution and any relevant functional relationships, for example those with external bodies and organisations. It indicates the level of seniority of the role and provides key information for the Teamwork and Motivation element in HERA.

It should be made clear to whom the role holder reports and whether s/he has any other key lines of accountability. An organisation chart should be inserted into this section of the form and should include the following:

- The job in question marked only as “X”;
- The role title, grade and RCN (or position reference) of the person that the role holder reports to;
- The role titles and RCN (or position reference) of the other roles reporting to that person;
- The role titles, grades and RCN (or position reference) of all roles reporting to the role holder.

Departmental administrators will normally be able to provide appropriate charts.

It usually works best to draw the chart with the line manager/supervisor at the top, the job in question immediately below, and peers on either side. Roles which report to the role holder should be shown below. .

Note that a hard line should only be used to identify the formal line management of the role, i.e. the role’s line manager, or those that the role line manages. A dotted line should be used to identify key contacts and essential relationships a role may have. The example organisation charts on the next page illustrate this approach.

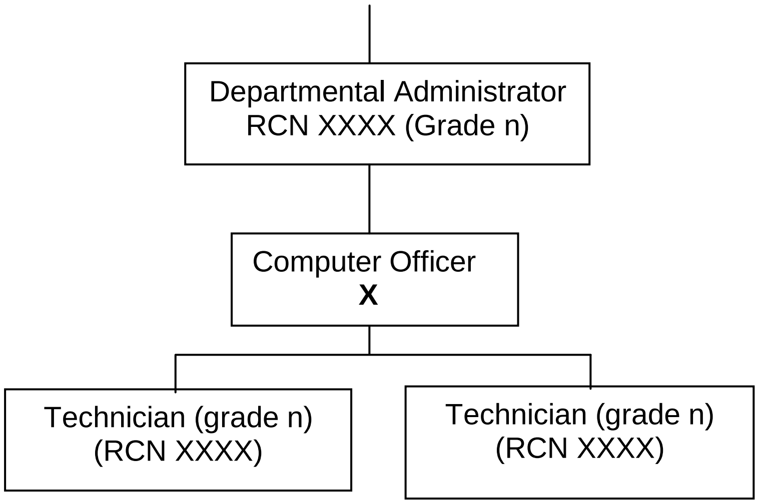
The names of individual role holders should not be shown on the chart - just role titles, current grades and appropriate code numbers. When using Part 2 (the Role Description) of the PD33 to send to potential applicants with the ‘Further Particulars’ of the role, the grades of the other roles on the organisation chart should be deleted. Those grades should be retained on the version to be used by Grading and Reward to grade the role.

A short paragraph may be added to explain any particular aspects of the organisation chart.

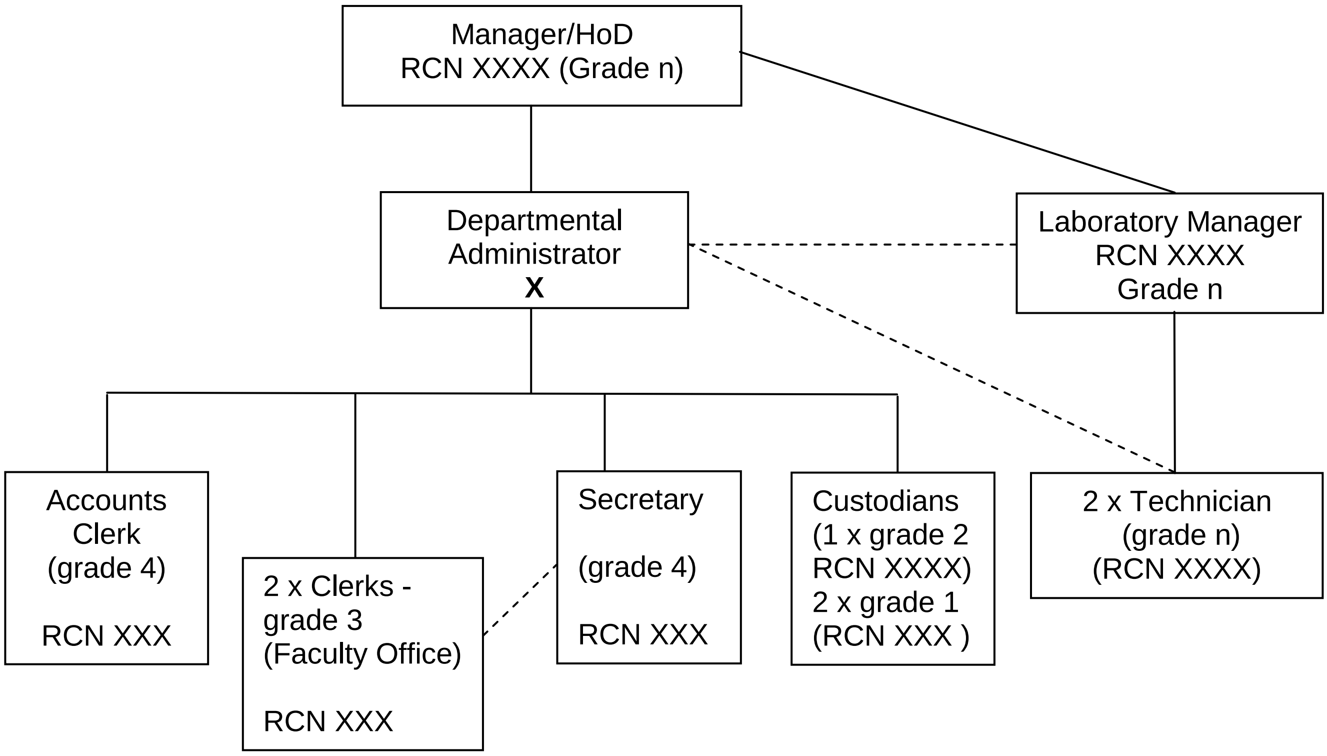
Further information about the management/ supervisory responsibility a role has should be detailed in section D.

Example 1.

Manager/HoD
RCN XXXX (Grade n)



Example 2.



Checks Required

List the checks that are necessary for this particular role and whether or not it is essential for these checks to be completed before an employee starts work in this role.

For further information on the different types of checks please see the Recruitment Guidance on the Human Resources webpage.

Mark an x against each of the checks to indicate if they are required or not

Role Purpose

The role purpose statement should explain the role's overall purpose in relation to the work area, team, faculty or department, giving an insight into the role and the context within which it exists. It should be a brief summary of the key purpose of the role but should not include a detailed list of the duties and responsibilities. The role purpose statement should aim to give a clear response to the question 'Why does the role exist?

'*To assist in the day to day financial management of the organisation*' would not be a helpful statement in understanding the main purpose of the role as it does not give an indication of the key purpose of the role and nor does it distinguish the role from any other specialist roles within the finance department.

Typical examples could include those listed below:

Role	Purpose
Cleaner	To undertake cleaning work within allocated zones of the department to maintain the facilities in a clean and hygienic condition.
Secretary/Administrative Assistant	To undertake duties of a clerical nature and provide secretarial support to the department including data input, diary management, filing and photocopying.
Technician	To develop, construct and maintain mechanical and electrical components and apparatus for teaching and research.
Departmental Administrator	To support the Head of Department in the management of administrative services throughout the department, specifically in the management of budgets/databases and be responsible for the supervision of all clerical staff within the department.

It will be helpful to complete the 'Main Responsibilities' first to develop an overall view of the role, and then use those insights gained to summarise the key purposes of the role.

Main Responsibilities

It is likely that information relating to each of the fourteen HERA elements will be drawn from the content supplied in this section. Any information covering the following HERA elements will be particularly helpful as they may not generally be covered in other parts of the form:

- *Teamwork and Motivation* – where there may be involvement in the supervision or line management of other staff.
- *Planning and Organisation* – where there may be co-ordination or management of medium to long term work/projects.
- *Analysis and Research* – where there may be involvement in gathering and manipulating data or information and/or in analysing and interpreting results.

State the level of involvement in any activities clearly. For example, a statement relating to staff management could be: '*Responsible for the day to day management of four staff to check that work is completed to the required standard; including training and development, work allocation, performance appraisal and first line discipline.*'

It is important to capture the essential requirements of the role which may, on occasion, be less than the range of duties currently being carried out by the role holder. For example, a role holder who has demonstrated proficiency in meeting the requirements of the role may be offered a development opportunity through making a broader contribution to the department; perhaps by supporting or serving on a departmental board or committee or representing the department externally. A particular duty might not be an integral part of the role if:

- The role holder is paid an allowance or has been awarded an additional increment in recognition of the additional duty;
- A new recruit to the role would not be asked to carry out the duty;
- The role holder is free to decline to take on the additional duty;
- Having taken on the additional duty, the role holder could decline to carry it out in future.

Duties <u>currently</u> being performed but outside of the essential requirements of the role could be described in the "Other information" section at the end of the form together with information on any payments made.

The table provides space for up to eight duties/responsibilities. More or less may be appropriate depending on the role. There is no single way of completing this section that would be appropriate for every role but defining the main duties and responsibilities of a role can be achieved using the following steps:

1. Identify the key duties and responsibilities of the role.

2. Define each duty and responsibility as a statement of what the role holder is expected to achieve (i.e. outcome) by:

- Starting the sentence with the action (e.g. plans, prepares, produces, provides, maintains, analyses, tests etc. Avoid words like 'assists', 'helps', 'ensures', 'deals with', 'manages', 'works with', etc, <u>unless</u> they are qualified by how that is done); <u>then</u>
- Describing the activity to which the action is applied (e.g. tests new systems, analyses financial data); <u>then</u>
- Stating briefly the purpose of the activity in terms of outputs or standards to be achieved (e.g. tests new systems to enable them to meet the agreed systems specification; analyses financial data using Excel spreadsheets to show departmental expenditure on a monthly basis).

3. Analyse the key duties and responsibilities and group related tasks together (where possible), e.g. those related to finance, those related to staff management, those related to the management of workshops or other resource. Check that each group is distinct from the others, and give each group a heading.

4. Check that the list represents the whole range of duties and responsibilities currently being carried out by the role holder. It is not appropriate to include duties that may be undertaken by the role holder in the future.

5. Determine the typical percentage of overall working time spent on each duty and responsibility and how often they are done. Note that 'frequently' and 'regularly' are not frequencies (they are open to interpretation) – 'daily', 'weekly', 'annually', etc, are all appropriate.

6. List the duties/responsibilities with the highest percentage first, then the next highest percentage and so on; this would normally indicate the order of their overall importance within the role.

7. Check that the key duties and responsibilities now listed are a true reflection of the role to avoid under or over emphasising the extent/level of responsibility.

Examples of duties and responsibilities could include those listed below:

Departmental Administrator		
	Key duties and responsibilities	% time spent/ frequency
1.	Management and Supervision of Staff	
	• Co-ordinate, supervise teams of staff in respect of allocating and monitoring workload, ensuring agreed policies and procedures are followed and quality of service maintained. • Undertake routine personnel management such as monitoring and authorisation of leave to ensure adequate levels of staffing. • Identify on-going training and development needs through informal and formal processes to determine individual development programmes.	25%, daily

Technician		
	Key duties and responsibilities	% time spent/ frequency
1.	Building Administration	
	• Undertake regular inspections of the building and provide monthly status reports to the Head of Department and the Senior Management Team. • Organise and maintain comprehensive building records and manuals, via Access database and Word documents, ensuring that all documentation is kept up-to-date according to departmental filing procedures. • Update building section of department website giving building and services information needed by members of the department and other users of the building.	20%, weekly

Cleaner		
	Key duties and responsibilities	% time spent/ frequency
1.	Cleaning	
	• Clean and prepare study areas and meeting rooms in the Library and the seminar rooms to meet agreed cleaning standards • Clean other areas as designated within the faculty to maintain agreed standards of cleanliness • Monitor stock of consumable materials and supplies and order stock to ensure adequate supplies are available at all times	75%, daily

Secretary		
	Key duties and responsibilities	% time spent/ frequency
1.	Examinations	
	• Type confidential examination material for Certificates, Diplomas, Tripos and Progress Tests ensuring compliance with required formatting standards.	20%, annually in a block
2.	Administrative Systems	
	• Maintain the division's filing system to enable easy access and retrieval of documents by all staff within the division.	10%, daily

Some less helpful examples would be:

	Key duties and responsibilities	**% time spent/frequency**	**Reason why statement is poor**
1.	Assists in X-Ray department when required.	10%	This statement does not reflect the actual role, nor what the role holder is expected to achieve. More information is required.
2.	Involvement in audit and research.	5%	This does not give an indication of the level and nature of the audit and research undertaken, nor what the role holder is expected to achieve.

Person Profile (Essential knowledge, skills and experience required)

This section of the form relates specifically to the *Knowledge and Experience* element of the HERA evaluation system. It asks for details of the knowledge, skills, qualifications and experience (however acquired) that are required to carry out the role effectively. This may be different from the attributes of the role holder who may possess these qualities to a greater or lesser degree than is required.

For example, 'an *up-to-date and comprehensive knowledge of employment law*' may be a requirement for a Human Resources Adviser role.

It is important to emphasise that it is the role that is being evaluated and not the person nor their level of performance, and that the length of service the role holder has in the job is not necessarily an indication of the type or level of experience required to carry out the day to day responsibilities of the role.

Include the levels of educational achievement and vocational training considered necessary to carry out the duties and responsibilities of the role.

Typical examples of knowledge, experience and skills may include:

Role	Knowledge, Experience and Skills
Secretary	RSA II or equivalent level word-processing Good level of oral and written communication skills Excellent organisation skills Ability to deal with a wide range of people at all levels Competence in using MS Office suite and familiarity with using databases (e.g. Access)
Research Laboratory Technician	GCSE level qualification in a science subject and in mathematics Communication/interpersonal skills Ability to organise time and work

PART 3 - ADDITIONAL GRADING INFORMATION

to be completed by whoever completed Part 2.

Section D - Supervision and Management of Staff

The information given in this section is used to score the Teamwork and Motivation, Pastoral Care and Welfare and Team Development elements within the HERA scheme.

This section looks at whether a role is responsible for overseeing the work of staff, contractors or volunteers, whether they are permanently assigned, or part of a project team.

Overseeing the work of others can include a range of activities and when answering consider whether the role:

- Allocates tasks, and checks the quality/ quantity of the work
- Provides feedback and guidance in situations where the work is not at the required standard. Cases where conduct or performance is unsatisfactory would be referred to the 'responsible person' for consideration through the formal procedures
- Is responsible for staff welfare issues, and if so what these entail.
- Undertakes the formal appraisal/staff review and development process.
- Identifies the training and development needs of an individual or team.
- Is responsible, when required, for formal performance management processes.

Roles may oversee a number of different teams; where this is the case, an overview of the responsibility for each should be included in the answer.

Any response to this question should focus on:

- Whose work the role holder oversees (group, project team etc.)
- What activities they are responsible for overseeing

Section E - Key Contacts

This section of the form requires information about the key individuals or groups and organisations/institutions with whom the role holder has contact on a regular or periodic basis both within and outside the University. Information relating to the HERA elements covering *Communication* and *Liaison & Networking* will be covered in this section of the PD33.

This section also requires information about the purpose of the contact (e.g. providing or exchanging information, explaining policies and procedures, co-ordinating meetings, building relationships, negotiating contracts with external suppliers etc). Only those key contacts that play an important and regular part in helping the role holder to carry out the duties and responsibilities of the role should be entered on the form.

Typical examples of key internal and external contacts are listed below:

Role	Key Contact(s)	Purpose of contact	Frequency of contact
Cleaner	Members of staff within the department	Exchange information about ordering more cleaning materials to enable cleaning standards to be met.	Daily
	Supervisor	First point of contact for other staff within the work area. Keeps abreast of any changes to cleaning routine/requirements.	Daily
Secretary	Students	First point of contact within the office. Receive queries, resolve or refer to most appropriate staff member.	Daily
	Academic members of the department	Exchange information about course regulations to ensure all teaching programmes run smoothly.	Weekly
Technician	Academics within the department	Exchange information about the expenditure levels of grant funding for particular projects and the health and safety requirements for laboratory environments.	Weekly
	Students within the department	Exchange information about how to use the laboratory equipment.	Daily
Departmental Administrator	Members of staff within the department	Providing information and advice about how to complete grant funding applications	Daily

Section F - Service Delivery

This section of the form requires an explanation of how the role holder provides help and assistance and a high standard of service to students, visitors, members of staff and other users of the institution. The *Service Delivery* element in HERA will be covered in this section of the PD33. Every role within the University provides a service; however, it is important to consider the following:

- is the role holder dealing with internal or external contacts who ask for service or require information? (i.e. the role holder is reactive)

  and/or

- is the role holder dealing with internal or external contacts where the service is usually initiated by the role holder, working within the institution's overall policies and procedures; does the role holder adapt the service accordingly to ensure the usefulness or appropriateness and quality of service in respect of content, time, accuracy, level of information or cost? (i.e. the role holder is proactive)

  and/or

- is the role holder setting the overall standards for service across a function or area of the institution?

Indicate to what extent the role holder provides a service e.g.

- What service does the role holder provide?
- To whom is the service being provided?
- How is the service being delivered?

Examples of service delivery are listed below:

Role	Service Delivery Examples
Cleaner	Provides a cleaning service to required to hygiene standards as defined by others.
Secretary	Responds to requests for information from staff and students regarding internal policies and procedures.
Technician	Designs experimental equipment for others to use which may prove to be time and cost efficient.
Departmental Administrator	Monitors and reviews the management of the administration service provided to students and staff and adapts service to suit changing needs as required.

Section G - Decision Making

This section of the form covers the impact of the role holder's decisions within the institution and externally. The *Decision Making* element in HERA will be covered in this section.

This may include decisions that impact solely on the role holder's work or team, decisions which impact across the institution, and decisions which could have significant impact in the longer term within or outside the institution. Examples of typical decisions made by the role holder should include:

- Independent (i.e. decisions made by the role holder alone - sole accountability),
- Collaborative (i.e. decisions made in conjunction with others - joint accountability),
- Recommendations (i.e. decisions which are taken by others following advice or input by the role holder - role holder not accountable).

Note: It is recognised that not all roles include all the above types of decision making and the emphasis for some roles may be on one or two types of decision making only.

Each section should contain a balanced list of examples – a minimum of three per section where possible. Some typical examples of decision making are listed below:

Role	Independent	Collaborative	Recommendations:
Cleaner	Decides upon the use of appropriate cleaning agent for different areas	Which rooms to clean first	To others about which cleaning materials to use
Secretary	Type of response to general enquiries, which information to send and who to refer requests for more detailed information to.	Drafting agendas and minutes of meetings with the line manager /supervisor	To others about appropriate conference venues to use
Technician	Decides quantities of materials to order for classes and when to do so	The design for making a piece of apparatus for experimental/ research purposes	To others on which particular technique (e.g. to use for an experiment to increase yield)
Departmental Administrator	Distribution of administrative duties within department's central administrative unit	The future administrative resourcing needs of the department	To others on appointment of staff; budget allocations within the department

Section H - Problem Solving

This section of the form requires typical examples of problems that the role holder is expected to resolve. The Problem Solving element in HERA will be covered in this section. Every role within the University deals with problems however it is useful to consider the following:

- Examples of the types of problems that the role holder deals with and how often they occur
- What does the role holder do about these problems?
- What options are considered by the role holder and how is the best course of action selected?
- Whether or not the role holder has to generate new or creative approaches to resolve the problem?

The section should contain a balanced list of examples of problems solved by the role holder and how that was accomplished – a minimum of five where possible.

Examples of problem solving are listed below:

Role	Example Problems
Cleaner	Responding to some emergencies as they happen (e.g. spillages and accidents) by clearing up where possible/safe to do so and reporting as appropriate – perhaps weekly.
Secretary	Coordinating various people for meetings by e-mailing birdcages for dates and times to suit all participants - daily.
Technician	Repairing machinery/experimental equipment when breakdowns occur – follows fault-finding procedures as appropriate or calls external engineers if beyond own remit – occurs perhaps twice per term.
Departmental Administrator	Alters budget allocations within department for Other Charges to rebalance expected expenditure for the next financial year. Receiving occasional student complaints and resolving them by direct negotiation, changing procedures, etc.

Section I - Work Environment

This section of the form covers the impact the working environment has on the role holder and the requirement to respond to and control that environment safely. It relates specifically to the *Work Environment* and *Sensory & Physical Demands* elements within HERA and may include such things as the temperature, noise or fumes, or any other environmental factors. For many roles a standard duty of care would apply, but any responsibility for the safety of others (e.g. a laboratory manager may be responsible for the preparation and use of special/dangerous compounds, materials, specimens, and equipment) should be detailed.

Indicate the sensory and physical aspects that are required for the role holder to complete the tasks within the role. This may include physical effort, co-ordination and dexterity, or applying skilled techniques and co-ordinating sensory information (e.g. sight, hearing, touch).

It may be useful to consider:

- What type of work is the role holder required to carry out?
- What, if any, special measures are taken to reduce risk or control the environment either before or during the work taking place?
- Is any safety equipment or special clothing needed?
- What responsibility does the role holder have for the health and safety of others working there?
- Does the role holder use any tools or equipment?
- Is the role holder required to lift, carry or handle large or heavy objects?
- Does the role holder work in cramped, confined or difficult spaces or awkward positions?

Examples of work environment are listed below:

Role	Work Environment Examples
Cleaner	Works with routine cleaning materials; occasionally uses moderate physical effort in respect of cleaning, moving furniture around etc.
Secretary	Works in an office.
Technician	Uses human cell lines, acrylamide, UV light, and ethidium bromide on a daily basis in the course of experimental work. Uses special safety equipment (e.g. goggles/full face respirator) and carries out risk assessments before using chemicals.
Departmental Administrator	Works in an office but has overall operational responsibility for a safe working environment in the department/faculty.

Section J - Teaching/Training

There are many roles within the University where role holders are involved in training people who may be within or outside the immediate work team. The immediate work team is defined as those roles directly associated with the role in question as opposed, for example, to providing training to staff associated with other sections or units within the department/faculty/institution. This section of the PD33 covers the two HERA elements related to teaching and training, i.e. *Team Development* and *Teaching & Learning Support*.

Everyone has a duty of care in the workplace. However, this section could also be used to describe those roles where the welfare and the wellbeing of staff and/or students within the institution, in both formal and informal situations, is part of the duties and responsibilities (the *Pastoral Care and Welfare* element within the HERA scheme). Note that this must be part of the job – an individual's personal disposition to act in a welfare role should not be included. The question to ask is – Would a replacement role holder be required to undertake a welfare role and therefore would the ability to do so be an essential selection criterion?

21 - Team Development

This section of the form requires explanation of how the role holder develops the skills and knowledge of others **in the immediate work team**. This may include any responsibility for inducting new colleagues, coaching and appraising any individuals who are supervised, mentored, or managed by the role holder, and giving guidance, advice or training to peers or supervisors on specific aspects of work.

It may be useful to consider:

- Does the role holder identify the learning needs of the team members and decide whether any of the team members should receive training or development?
- Does the role holder instruct, coach or guide others, decide what materials should be used or assess the learning that has occurred?

Examples of team development are listed below:

Role	Team Development Examples
Cleaner	Shows new colleagues how to use cleaning equipment.
Secretary	Explains administrative systems and procedures to team members such as how the filing system works within the department/faculty.
Technician	Demonstrates how to operate a particular piece of equipment to members of the team once per month.
Departmental Administrator	Conducts annual staff appraisals; delivers training to team members on how to enter invoices on the Cambridge University Finance System.

22 - Teaching and Learning Support

This section of the form requires explanation of how the role holder develops the skills and knowledge of others **who are not part of the immediate work team.** Indicate any responsibilities for providing induction to students or others, any teaching or training for students or others, any assessment of whether the teaching or training has been effective. Indicate any responsibility for designing the training content, materials or methodology and whether this is within existing frameworks.

It may be useful to consider:

- Who does the role holder teach, develop or provide with teaching, learning or support?
- Does the role holder design and develop the course content?
- Does the role holder decide on how the content is to be delivered?
- Is the role holder involved in assessing the effectiveness of the teaching, learning or support?

Examples of teaching and learning support are listed below:

Role	Teaching and Learning Support Examples
Technician	Demonstrates the safe use of machinery or equipment in the laboratory to about 45 students in triplicate classes at the start of each academic year.
Departmental Administrator	About three times per year gives short training sessions on how to complete research grant applications and the relevant forms to new PIs and other research staff

Section K - Other Information

Any further information which is important in understanding the role may be added here.

<u>Part 4 - AGREEMENTS</u>

Role holder:
If the role is occupied the role holder must sign-off this section to signify their agreement to the accuracy of the contents of Parts 2 and 3 of the form.

Line Manager/Supervisor:
The line manager/supervisor of the role must sign off this section to signify their agreement to the accuracy of the contents of Parts 2 and 3 of the form.

Head of institution or nominee:
The Head of institution or nominee must sign-off this section to signify their agreement to the accuracy of the contents of Parts 2 & 3 of the form.

The agreements above are solely agreements as to the accuracy of Parts 2 and 3 of the form. In the case of a filled post they do not necessarily signify agreement with the grade being sought or that a regrading request is justified or supported.

Appropriate authority: (filled posts only)

The appropriate authority (i.e. the Secretary of the School or the relevant Officer of the appropriate authority for non-School institutions) must complete this section <u>for all regrading requests for filled posts.</u> This is to signify that the authority is aware of the regrading request and approves of the request being considered by Grading and Reward.

<u>Checklist</u>

The checklist below may be used to review the form to make certain that all the sections are adequately completed and that the form has been signed off as appropriate.

When the form has been completed, check that:	✓
• every section of the form is completed and/or that “None” is inserted in sections thought not relevant to the role (‘Not Applicable’ is not an acceptable answer).	
• the wording makes sense and that the role is clearly explained.	
• there is as little jargon and as few abbreviations and acronyms as possible used in the document.	
• the names of individual role holders do not occur anywhere in the document.	
• the document includes all current duties and responsibilities.	
• the document is internally compatible and consistent throughout, particularly with regard to any supervisory duties.	
• the content of the document is compatible with the PD33s for the supervisor and for any relevant neighbouring roles.	
• the document uses gender neutral terminology throughout.	
• the sign-off process has been followed and concluded.	

PD33A

Section A – Role Details

1. Faculty/ Department:
The full name of the Faculty or Department that will administer the role – this is not necessarily where the role will be physically located.

2. Grade:
Enter the grade of the role being cloned, or the grade of the generic as listed on the website.

3. Position title:
What is the intended local title that the department would like this role to be known as. See the recruitment guidance for further information on naming of roles.

4. Reason for profile:

Reason for Profile	Used When/ Where
Clone	Create a copy of an existing role, with no changes to the underlying PD33. Enter the Role Code Number in the column to the right
Generic	Create a role using one of the generic profiles on the Grading and job evaluation website. Enter the relevant code in the column on the right.

5. Basis:
Tick the relevant option.

Line manager details
The person or position that this role will report to

Enter either the:
- position reference number (either a 5 digit number, or an 8 digit number beginning with a 7)

OR
- the full name (forename and surname)

Pre-employment checks
List the checks that are necessary for this particular role and whether or not it is essential for these checks to be completed before an employee starts work in this role.

For further information on the different types of checks please see the recruitment guidance on the Human Resources web pages.

Section B – Agreement

Agreement by Head of Institution or Nominee:

The Head of the institution (or their nominee) must complete this section to signify that the institution agrees to the accuracy of the contents of the request and the approval has been given for the creation of a new role.