

Oxford Archaeology - Creating a new job description for Senior Project Managers

Who they are and what they are regarded for

Oxford Archaeology was founded in 1973 and has become the largest independent archaeological practice in the country. It has 200+ specialist staff based in Oxford and Lancaster. It is a registered educational charity with the aim of helping people to discover and enjoy their heritage. Where appropriate, they open their sites to the public and enable volunteers to take part in excavations, responsibly.

Its Chief Executive, David Jennings, is committed to Archaeology being properly recognised as a profession, not least by other professionals with whom they work within development projects.

David and his team are convinced that National Occupational Standards (NOS) can underpin the development of a stronger sense of profession. One particular interest is the extent to which NOS can also offer a way of supporting organisational needs, whilst allowing for the particular passions that people bring to this profession.

Oxford Archaeology has a reputation for leading the way in promoting professionalism. It is very aware how in archaeology, unlike most other professions, there is no overall skills mix that is typical, and that the huge diversity of skills and wide variety of activities, can itself create a barrier to professional recognition.

What they wanted to achieve

In 2000 Oxford Archaeology set out a 5 year strategic plan for the organisation, key to which are the following goals:

- commercial recognition as professionals
- 2.5% of each person's time for personal development and training
- a nationally recognised training programme
- clear career paths and opportunities.

The issue facing the company has been how can it best build in an underpinning of the professionalism of its own people, and promote it. Where especially should the building start? The sensible starting point was with the most powerful advocates in the business, the Senior Project Managers – whose professionalism in archaeology is well recognised internally as well as externally.

The project therefore was to develop a new job description for the role of the Senior Project Manager, not as an administrative measure, but as a tool to support important personal and corporate ambitions. A tool to support clearer training and development targets and to clarify career paths.

With the detail that the NOS would provide, the job description would be able to offer greater clarity and a greater level of detail about the skills, knowledge and experience that are expected of the Senior Project Manager across the organisation in Oxford and Lancaster.

The Outcome

Oxford Archaeology has produced a new job description for the role of Senior Project Manager based entirely on NOS.

It is seen as especially useful for:

- the recruitment of new staff, providing greater clarity for those who are managing the recruitment process and for applicants
- clearly stating to others what is required by Oxford Archaeology and the high standards they set
- offering direction to those aspiring to be in the position of Senior Project Manager, as well as those who are guiding them
- in the future, integrating with their new appraisal process and supporting accurate, targeted and relevant training and self-development planning.

What did they do?

After both a general exploration of ideas with IFA and other agencies and a specific planning session with both IFA and organisational development specialists, Grant Associates, the Chief Executive and the Project Officer agreed a plan of action to produce the job description for Senior Project Managers.

The key stages were:

- set up a small working party of Senior Project Managers led by the Project Officer, who had experience of creating job descriptions
- identify the Units in the NOS which seemed relevant to the role
- examine those relevant Units in detail and agree a list
- design a job description format and write a job description based on those relevant NOS Units
- present the draft job description to the Senior Management Team and other stakeholders for feedback
- present the draft job description to Senior Project Managers for feedback and agreement
- finalise the job descriptions.

Project Process

Month	Activity	Purpose
1	Decision to pursue this project and project planning meeting.	To establish project plan.
2	Communication and information activity with key stakeholders i.e. <ul style="list-style-type: none"> – Initial consultation with Senior Management Team – Memo to all Senior Project Managers (SPMs) – Presentation to Oxford Archaeology Consultation Board – Consultation with Prospect 	To inform and gain agreement where necessary.
3	Presentation to SPMs and invitation to take part in working group to develop job description.	To offer opportunity of involvement to all.
3	First meeting of volunteer working group.	To familiarise with the NOS and scope the project.
4	Working group meeting on roles and NOS.	To begin analysis of role of SPM using NOS as a benchmark. To look at the full set of NOS Units to establish what might be essential to the role of SPM and what might not be essential but would be desirable.
4	Working group meeting on refining choices.	To refine initial choices so that they more accurately reflect the role of the SPM and further consider how essential each Unit was to the role.
5	Working group meeting on job description definition and detail.	To further refine and define the content of the job description. To look at the detail of the performance requirements, context, knowledge and skills to refine choices and end up with a final list.
7	Final essential Units and Elements refined and combined into 8 statements to create the selection criteria of the job description.	To produce first draft.
7	First Draft sent to Senior Management Team for comment.	To give everyone the opportunity to provide feedback.
8	Supplementary notes to accompany job description prepared.	To offer some of the detail that lay behind the selection criteria
8	Consultation for feedback on draft new job description <ul style="list-style-type: none"> – workshop for Oxford SPM's with CE – working group members and project officer – meeting for Lancaster SPMs with member of working group – distribution of new job description to all SPMs who were not able to attend. 	To include all SPMs in considering the draft and an invitation to offer comments, opportunity to answer questions and respond to issues.
8	Working Group Meeting on finalising the job description.	To consider feedback, refine the Draft and agree final job description and 'Notes to accompany the Job Description.'
8	Incorporation of final comments and preparation of strategy for implementation.	

Questions, Debates and Responses

How easy was it to find time for this project?

Given the nature of archaeology, of project management and the workload at Oxford Archaeology it did sometimes prove difficult to get dates where all the working group could guarantee their attendance or Senior Project Managers could come together to review the draft job description. Also, having bases at Oxford and Lancaster, holiday leave, winter illnesses and Christmas in between, did mean that Oxford Archaeology had to give a long enough period of time to the project to allow for the level of consultation they felt necessary to produce the right product.

The project took 8 months in all to complete. See Project Process.

I do not see that we would have done much differently were we to start again. Eight months may seem quite long but the issue is being consultative. The time is a reflection of the amount of resource you can put into this task but particularly a reflection of the energy involved in getting people to come with you. All my experience says that there will be people who might have done this more rapidly but not more effectively.

Chief Executive

Do we create a job description that reflects our current roles or one that is aspirational?

Senior Project Managers soon discovered that current occupants performed a variety of roles. The question arose about whether a job description should try to embrace that reality or aspire to defining the essential role the organisation needed. The debate was resolved by a decision that they would try to establish a generic job description that reflected the essential role of a Senior Project Manager.

How much of an archaeologist do you have to be to fill the role of a Senior Project Manager?

One of the significant issues raised during consultation with the working group and other Senior Project Managers is the extent to which Senior Project Managers were more defined by their management skills than their archaeological knowledge and experience. In working directly from the NOS, the working group discovered that the absolute essential functions of the role were managerial, not archaeological and some found that disturbing or inappropriate.

The archaeological and personal attributes; these bare bones do not account for it all.

Senior Project Manager.

Since all involved in the pilot project believe that to satisfactorily fulfil the post of Senior Project Manager, one must have knowledge and experience in archaeology, this issue was addressed by looking at a number of ways of defining the need for archaeological skills and experience within the job description. One of these was the requirement that Senior Project Managers

hold Member status membership with the IFA. It was therefore added to the job description that anyone holding this post or an applicant for these positions, should be an accredited Member of the IFA and therefore have demonstrated their knowledge and experience in one or more of a selection of Areas of Competence.

How do we develop this job description in a way that Senior Project Managers feel appropriately included?

The invitation to Senior Project Managers to volunteer for the working party was designed to encourage participation. The resulting three volunteers provided a good mix of Senior Project Managers, two from Oxford (one recently appointed, one with many years experience) and one from Lancaster. All Senior Project Managers were subsequently invited to a 2 hour workshop to consider the draft job description. At this event it was decided to give a further week for reflection and opportunity for feedback. People felt that they would be better able to comment if they had longer to familiarise themselves with the full set of NOS and had longer to consider for themselves some of the debates that the working party had had at length. In order to ensure that Senior Project Managers at both Lancaster and Oxford felt involved, when geography did not permit everyone to be in the same room, arrangements were made to run sessions to consider the draft job descriptions at both sites within the same week.

How do we make the job description reflect all the NOS Units and Elements it covers, yet still remain comprehensible and undaunting to read?

This was an ongoing dilemma throughout the life of the pilot project. It centred on trying to capture the wide range of roles that a Senior Project Manager does, in sufficient detail as to be clear and explanatory, while being succinct and general enough to create a benchmark upon which all Senior Project Managers' jobs and performance can be measured.

At an early meeting the working party identified 27 NOS Units which they felt could be relevant to the role of Senior Project Manager. On examining the detail of the Units and after much debate, that number was reduced to about 12 essential Units. Given the feeling that some repetition of language existed between the Units that had been selected, the decision was then made to condense these Units into a small number of major statements (8 in the final draft) as an overall summary of the role. These Key Selection Criteria each encompass one, two or three of the NOS Units.

How easy was it to work with the National Occupational Standards?

At first meeting the complete set of Archaeology NOS can seem daunting in size *"I found it difficult to work out the geography of a huge document like this"* Senior Project Manager

The standards?...Once you took a little time going through them – It does not take long to get your head round them. The layered presentation is helpful, it

lets you delve into the detail when you need to. But the level of detail is not intimidating – as a framework it's very useful.
Senior Project Manager

Stakeholders thoughts on the project and its results

Was it worth it? - Senior Project Manager

It was definitely worth the energy...it was a very extended process – but it's a pilot project. I sign up for the whole thing...Its the foundation on which you base training programmes. Its such a basic thing we need to do, an excellent and positive thing we need to do. There's always so much talk about the importance of career and training opportunities, this is making it happen.

Strengthening the fundamentals - Chief Executive

The interesting thing about this process has been that it has crystallised some of the deeper underlying principles of why our organisation does what it does especially its educational focus. NOS has helped these job descriptions link with the fundamentals of what we are about.

A very useful process - Senior Project Manager

*First we had to stop and look at ourselves and analyse our structure and roles, ...it was very helpful in raising issues about what we do and how we do it. Because Archaeology is so diverse, it is a very useful process.....
Archaeology as a whole is screaming out for standards.*

A trailblazing venture - IFA, Head of Training and Standards

Oxford Archaeology's application of the NOS in matching the skills needed to carry out the role of Senior Project Manager is a trailblazing venture. For the first time, a job description has been written in the specific terms of what someone has to be able to do and how they can show that they can demonstrate their competence. This allows individual archaeologists to see what skills they need if they aspire to work in a post such as Senior Project Manager, whether at Oxford Archaeology or elsewhere in the country. As NOS are adopted into job descriptions nationwide, archaeologists will be able to map out their career ambitions in terms of skills and will be able to seek out the training to deliver those skills with the qualifications that demonstrate what they have learned.

Bringing together different opinions - Senior Project Manager

Through the process of the working group there were different people with different views of what we do and don't do. We (SPMs) have a very different mix of roles and the question was how do we encompass this. We defined the management functions, but what went in and what got left out..... there were differences of opinion.

Understanding the differences - Senior Project Manager

It highlighted the differences of perception between personal and company expectations. That particular core part of the job may be tedious but it's the bit that gets the results.

The value of professional standards to us - Senior Project Manager

We recognise that we have to define our jobs in terms of standards recognisable by others for reasons of things like pay and professionalism. This has made our roles more communicable. There are very few formal qualifications – so we need to develop training for people who don't fulfil these criteria. Internal training is probably not adequate, it might be a bit ad hoc and would it be recognised? We need external standards and perhaps the training needs to involve major competitors with whom we also collaborate.

Next Steps

Linking the Job Description to development

As a first foray into using the professional standards created for archaeology, Oxford Archaeology have done a significant piece of work which could lead to NOS being a point of reference for their continuing development of skills and expertise.

We need to create an architecture that links this job description to appraisal, personal development planning and training
Chief Executive

Seeing whether we can now apply the NOS to our training plan is the next challenge. There is an immense skill shortage and large problems in obtaining skilled people. There are plenty of graduates but very few with the skills sets necessary for applying what they know to the work environment. The challenge is developing a focused and coherent training programme the outcomes of which are meaningful to the trainee and to everyone else with an interest in what people can professionally do.
Chief Executive

Tools and Products

Produced as part of this project and available for you to use

- **Job Description for a Senior Project Manager's Role**
- **Project Process Map for writing Senior Project Manager's job description**
- **Communications Workshop Design**

Job Description for Senior Project Manager's Role

The NOS relevant to the job description are identified by their NOS Unit number at the end of each criterion. The content of those Units will identify in detail the level of skill and knowledge expected of the Senior Project Manager. The Units and the detail within them, together with this job description will offer all the information required to create a recruitment pack to support effective recruitment for both recruiter and applicant.

JOB DESCRIPTION - SENIOR PROJECT MANAGER

Job Title: Senior Project Manager

Salary Grade Range: Sp 27 - 38

Reports To: Head of Fieldwork
Operations Manager
Head of Publications

Management Responsibility: Project Teams

OXFORD ARCHAEOLOGY'S PURPOSE and MISSION: as a registered Educational Charity, it is our mission to contribute to advances in the body of knowledge and archaeological practice and strive to broaden the public's understanding of archaeology and heritage.

FUNCTION: To manage and take full responsibility for archaeological projects and in so doing contribute to the advances in the body of archaeological knowledge and practice, and exploit opportunities to broaden the public's understanding of archaeology and heritage.

KEY SELECTION CRITERIA:

These Key Selection Criteria are based upon the Standards and Functions in Archaeology as set out in the National Occupational Standards (NOS) for Archaeology published in March 2003, and identify the core skills for a Senior Project Manager.

The applicant must be able to demonstrate competence and significant experience in undertaking the following core management tasks:

1 developing procedures to identify and reduce risks to health and safety in the work place, including the preparation of risk assessments (NOS AJ9)

2 defining project aims and objectives in terms of measurable outcomes, ensuring clarity with the client and other stakeholders (including curators) regarding their needs, and identifying factors that affect their achievement (NOS AB1)

3 developing project designs including identification of appropriate project methods, estimating resource requirements, cost estimates, and developing project programmes and

schedules. (NOS AB2 and AB4)

4 working effectively with clients in the agreement of services and fees, including the preparation, negotiation, agreement and conclusion of contracts (NOS AB6 and AJ4)

5 determining and assembling appropriate project teams, including subcontracting specialists, and other staff resource requirements (NOS AJ5)

6 controlling project costs, quality and progress, including financial tracking, project quality assurance and progress scheduling and monitoring (NOS AJ7)

7 managing the performance and development of teams and individuals including task allocation, preparation and monitoring of work plans, identifying project-specific training needs and assessing work performance, including dealing with poor performance (NOS AJ6, AJ11, and AJ12)

8 contribute to the advances in knowledge and theory which underpin archaeological practice, enabling others to learn and benefit from your experience, and exploiting opportunities to broaden the public's understanding of the material remains of past communities (NOS AK2)

The applicant should be registered as a Member of the Institute of Field Archaeologists and be able to demonstrate expertise in one or more of the following areas:

Cultural Heritage Management

Landscape Archaeology

Archaeological Fieldwork

Historic Buildings Recording and Conservation

Archaeological Post-Excavation and Publication

Artefact Studies

Palaeoenvironmental Studies

Education, Publicity and Public Relations (heritage related)

Archive and Museum Studies

Project Process Map for writing Senior Project Manager's job description

The process can be followed to support the writing of any job description based on the National Occupational Standards.

Project Planning meeting

- establish clear objectives
- identify those whose help is needed for the project
- identify potential barriers
- identify key stakeholders
- clarify any authority/agreement that needs to be sought
- set realistic timescales and deadlines
- set regular review points

Communication and information activity with key stakeholders

Plan appropriate and timely communications with all stakeholders who may need to be informed, consulted or whose agreement needs to be sought e.g.

- senior management
- union representation
- professional bodies
- those who the project may affect
- people from whom you require some input

Invitation for working group members

If possible:

- get an appropriate mix of experience and representation
- get a group large enough to allow for absences and interesting debate
- ensure you have left no one/group out who should be invited

Series of working group meetings to identify and refine the appropriate selection of NOS

Allow time for :

- familiarisation with the NOS
- debate and discussion. This is a necessary part of the process
- consultation periods if others need to see your work during this phase
- thinking time between meetings

Create a format for job description and incorporate agreed NOS Units into it

Circulate draft to key stakeholders for comment and agreement

Finalise new job description

Communications Workshop Design

Session with Senior Project Managers to present new Job Description

This is a summary of the 2 hour communication workshop which was planned for a group of 12 +, but the key stages and principles equally apply to smaller groups. Session 5 could become less structured with a smaller group,

Overall **purpose** of the session is to

- bring people up to date with the new job description
- provide opportunity to ask questions about the job description and the project
- get feedback / agreement

	Session/purpose	who	content	comments
1	Introductions Why we are here and what we want to achieve today	Facilitator	Introductions <ul style="list-style-type: none"> • about the project • about the NOS/what they are and how they were developed 	
2	Opening comments	Senior Manager	To refocus on why OA are involved in this project and set the project in a broader context Why here today - wish to get their response to the job description; feedback and agreement.	
3	Clarify the process and set the context for taking a look at the new job description	Project Officer	Information about the process that has produced the new job description including: <ul style="list-style-type: none"> • who was involved • what they did • an example of the NOS • how we worked with the NOS 	need to refer people to the NOS if they are not familiar w them. need to present an Element or two and be able to show & explain the performance criteria/essential knowledge etc

			<ul style="list-style-type: none"> • issues and considerations that arose • core/non core material • revision process • consultation with Senior Management/Prospect • where we are now 	
4	Familiarisation with the new job description and opportunity to ask any questions for clarification	Project Officer	Take them through the content of the new job description clarifying any immediate questions	Attempt here to focus on questions for clarification <i>only</i> : the next session gives the opportunity for people to cons and discuss the broader questions that might be raised.
5	Small group work to enable people to take a good look at the new job description and establish what they think of it and what, if anything they wish to ask or comment on	Facilitator	<p>Work in groups of 3 to take look closely at the new job description, discuss it, establish responses and establish what people would like to ask (if anything)</p> <p>Process:</p> <ul style="list-style-type: none"> • into 2's/3's • look at the job description • discuss initial thoughts • what benefits can they see in writing the job description in this way, to; <ul style="list-style-type: none"> - Self - the business - Others? • what questions do they have? • record benefits and questions 	<p>Potential benefits to SPM</p> <ul style="list-style-type: none"> • support their work with Project Officers ie make it simpler/clearer to support others towards the role of SPM • greater clarity of what is expected in the role ie giver level of detail in the NOS that underpins this • for new SPMs, greater clarity about what is expecte them ie for appraisal, training etc <p>benefits to business</p> <ul style="list-style-type: none"> • clearer criteria for selection for all involved - applicar recruiter • improve recruitment strategy overall • potential for greater consistency and clarity about w people can do <p>benefits to others</p> <ul style="list-style-type: none"> • for aspiring SPMs - greater clarity about what they re aiming for • for the sector - potentially greater consistency across sector
6	Feedback and Questions	All	Feedback from the smaller groups on benefits	One facilitator to manage the feedback but responses wi

	Opportunity to articulate any issues and ask questions/have them answered honestly		and questions	<p>probably involve everyone who is managing the session working party members etc.</p> <p>Need to anticipate if there are questions that would need considered response. Here are some to possible questions:</p> <p>How does this affect my pay? What if there is something on there that I don't do? What if I don't meet the criteria myself? What are the implications for training? What about those of us who are not registered members the IFA? When are we going to start using the new JD? Why did you feel the need to make this change? Are you going to redesign all the job descriptions on this basis? How does this fit with other initiatives ie appraisal process/ PDP? When are you going to start appraising us against these requirements?</p>
7	Close	Senior Manager	Need to round up the session by telling people what will happen next?	<p>There maybe some feedback on the draft job description which will need to be acted on or possibly questions that need a more considered response. Also let people know what is happening to keep people a other sites involved.</p>