

Guidance on REF 2029 Main Panel and Sub-panel membership

1. Introduction

- 1.1 To ensure fair, transparent, and inclusive treatment and support for all University staff serving as panel members for REF 2029, the following guidelines should be implemented, applying to all staff irrespective of their contract type.
- 1.2 Under the [University Procedure in relation to Work for Outside Bodies including Consultancies](#), REF panel membership most closely aligns with the category of *'outside work not normally requiring formal approval includes work that contributes to a staff member's professional academic life involving academic scholarship such as the authorship/editorship of books, articles and journals, technical or literary advice, reviewing, refereeing, external examining, membership of committees, councils or panels of professional and governmental organisations/agencies, and public lecturing and broadcasting connected with the member of staff's professional activity. Involvement in all such activities should, nevertheless, have the support of the Head of Department'* (Para. 8b). However, to ensure fairness, transparency and inclusiveness, this guidance advises that formal agreement be sought.

2. Initial discussions and provisional approval

- 2.1 **Pre-application discussion:** Staff members interested in serving on REF panels are required to hold an initial discussion with their Head of Department or line manager prior to applying for panel membership. This meeting should cover the type of membership being considered, the associated commitments and responsibilities, and should seek provisional approval to proceed with the application. To ensure fairness, transparency, and inclusivity (as outlined in Section 4 below), formal agreement is strongly recommended as part of this process.
- 2.2 **University endorsement:** Where applicable, applications may be reviewed by the University's REF Strategic Leadership Group to assess candidates' suitability against the criteria established by REF.

3. Post-appointment discussions

- 3.1 **Commitment and Responsibilities:** Following their appointment, panel members must engage in further discussions with their Head of Department or line manager to agree on specific commitments and responsibilities. These discussions aim to ensure mutual clarity on expectations and requirements.
- 3.2 **Documentation:** The outcomes of these discussions should be documented in writing, outlining the agreed commitments and responsibilities. This documentation should be shared with the REF Team and the REF Strategic Leadership Group for monitoring and evaluation purposes, including conducting an equality impact assessment (EIA). This approach ensures transparency, prevents misunderstandings, and upholds principles of equity, diversity and inclusion (EDI).
- 3.3 **Transition to Assessment Phase:** The commitments of panel members shift significantly between the Criteria-setting and Assessment Phases of REF. Staff appointed to the Criteria-setting Phase are therefore advised to arrange a follow-up discussion with their Head of Department or line manager before proceeding to the Assessment Phase. To support this discussion, staff should seek workload projections from their Panel Secretariat.

4. Fair and transparent treatment

- 4.1 **Workload adjustments:** Heads of Department or line managers should acknowledge the additional workload associated with panel membership. Where appropriate, adjustments should be made to the staff member's responsibilities, including backfilling roles if necessary, to allow sufficient time for panel duties without compromising their primary responsibilities. As a reference, an allowance of 0.4 FTE was typical for REF 2021 panel membership, although the final allocation may reflect the scope and nature of the individual's academic responsibilities. Additionally, guidance should be provided on balancing panel commitments with university duties to ensure neither is compromised.

- 4.2 **Support systems:** Staff should be offered appropriate administrative and logistical support, such as access to resources, data, or assistance from other team members.
- 4.3 **Clear communication:** Open and regular communication should be maintained throughout the REF cycle to address any emerging issues or conflicts. Staff should also be provided with clear information about the time commitments involved, including meeting attendance, reading and reviewing.
- 4.4 **Acknowledgement of Contributions:** Panel contributions should be recognised through the ADR process. Staff members are encouraged to record their panel engagement in their PURE profiles.

5. Monitoring and Review

- 5.1 **Regular check-ins:** Periodic check-ins between staff members and their Head of Department or line manager should be scheduled to monitor progress and address any concerns related to REF duties.
- 5.2 **Feedback Mechanism:** A feedback mechanism should be established, allowing staff to report challenges and enabling continuous improvement in supporting staff during future REF cycles.

6. Contribution to REF Preparations

- 6.1 **Short-term contribution:** Staff members supported to serve as REF panel members are expected to contribute to the University's REF preparations. This includes sharing insights and expertise gained from their panel involvement via the University REF Team and REF Academic Lead.
- 6.2 **Long-term contribution:** Over time, staff should continue to share their knowledge and experience to strengthen the University's REF strategies and submissions.

7. Appointments Throughout REF Cycle

- 7.1. Panel membership evolves throughout the REF process, with vacancies potentially arising at any stage.
- 7.2 **Previously Unsuccessful Candidates:** REF panel selection involves balancing disciplines and meeting other criteria beyond individual expertise. Candidates not selected previously should not be discouraged from reapplying when new opportunities arise. Such candidates should follow the discussion processes outlined above.
- 7.3 **New Applicants:** New applicants must adhere to the same guidance regardless of the timing of their application.

8. Benefits to staff and the University

- 8.1 By following these guidelines, the University ensures that all staff members receive fair, transparent, and inclusive support in their roles as REF panel members.
- 8.2 For staff, participation on REF panels offers significant professional development opportunities, including the chance to enhance their skills in research evaluation and deepen their understanding of research quality standards. Additionally, panel membership facilitates valuable networking opportunities, enabling staff to build connections with leading researchers and academics from other institutions.
- 8.3 The University, in turn, benefits greatly from this engagement. The participation of its staff on REF panels enhances the institution's reputation, showcasing its commitment to excellence and collaboration within the research community. Moreover, the insights and expertise gained through panel membership contribute directly to strengthening the University's REF preparations, both in the immediate term and for future submissions.