

# Professional Fellowship Scheme

Guidance for participating organisations

2022-2023

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## 1. Introduction

Under their renewed [Memorandum of Understanding](#) (2017-2020), The National Archives and Research Libraries UK (RLUK) have created a Professional Fellowship Scheme to enable staff from both organisations to gain experience and insight from one another, strengthen and diversify the relationship between them, and to overcome some of the collective challenges facing research and cultural organisations.

This scheme will support RLUK members and The National Archives in their daily operations, help contextualise these within wider professional and organisational settings, and identify additional areas of potential collaboration. The scheme will support the corporate aims and ambitions of The National Archives, as outlined in [Archives for Everyone](#). It will support RLUK's strategy [Reshaping Scholarship](#), whilst also enabling personal development opportunities for the individuals involved. It also supports the Government's vision for the Archives Sector, [Archives Unlocked](#).

Professional Fellowships will be structured around a short-term visit to The National Archives, for Fellows from an RLUK member institution, and to an RLUK member institution, for Fellows from The National Archives, underpinned by a longer period of peer-to-peer mentoring and knowledge sharing. Professional Fellowships will address a professional-practice question, contribute to a wider piece of work, and facilitate shared learning between The National Archives and individual RLUK members. Each fellowship will last for one year and the selection and recruitment of the fellows will be undertaken jointly between The National Archives and RLUK. A financial allocation will be made to support the work of Professional Fellows.

This document provides guidance for an organisation participating in the Professional Fellowship scheme. It outlines the expected commitment of

organisations hosting and sponsoring a Professional Fellow, and what organisations can expect from the scheme. It also outlines the role and responsibilities of mentors, who will be asked to support and supervise a visiting fellow. This document should be read in conjunction with the *Professional Fellowship Scheme Guidance*, which includes further information about the scheme, its structure, and the expectations surrounding the work of individual Professional Fellows.

## **2. Sponsoring a Professional Fellow**

Professional Fellowships are designed to be a supported and prestigious opportunity for an individual to develop their skills, knowledge, and experience whilst still undertaking their substantive post within their home institution. They are not secondments and it will be important that applicants discuss their proposed fellowship with their line manager or head of department from the outset. The scheme encourages applicants to “take ownership” of their Fellowship, tailoring it to a specific professional practice question, in support of their wider substantive role. Applicants should ensure that their Professional Fellowship will bring the greatest benefit to their own professional development (via their Continuous Professional Development Plan), their home organisation (through its contribution to wider pieces of work and their substantive role), and the relationship between The National Archives and RLUK.

### **2.1. Role of a Sponsoring Organisation**

The success of an individual Professional Fellowship will depend on the support and commitment of a Fellow’s sponsoring organisation (i.e. the organisation from which they originate). Organisations should support staff in the development of their application to the scheme, ensuring that it supports them in their substantive role and professional development. If an applicant is successful, sponsoring organisations

should ensure that staff have adequate time to undertake their Fellowship and that its findings and outcomes can be shared and embedded throughout the organisation.

## 2.2. Expectations and commitments of sponsoring organisations

In order to support the fellow, sponsoring organisations should consider the following:

- *Adequate time allocation:* The time committed to each individual fellowship will vary between Fellows and should be agreed between applicants and line managers. Adequate time should be allocated to the Fellowship's activities, including the residency period within another organisation (usually of around 2 weeks), and regular monitoring be undertaken to ensure that this is sufficient. The allocation of sufficient time may require the temporary adjustment of an individual's roles and responsibilities within their substantive post during the period of the fellowship. We would estimate that up to 10% of an individual's working time should be spent on Fellowship activities during the period of their Fellowship.
- *Residency and leave allocation:* We would expect that sponsoring organisations treat the period a Professional Fellow spends "on residency" within another organisation as work time and thus not requiring the Fellow to take this time as leave. We suggest that the residency period lasts for around 2 weeks. However, Fellows and host organisations should discuss this residency period and may find it more beneficial to visit over a more extended period (for example, 1 day a week over several weeks).

- *Inclusion within performance objectives:* A Professional Fellowship will be a substantial undertaking. We encourage the inclusion of the Fellowship's activities within the performance objectives of individual Fellows and that this forms another layer of monitoring of the Fellowship's progress.
- *Dissemination and wider benefit:* line managers and applicants should consider how the findings and experiences of the fellowship will be shared and disseminated within their organisation for the greatest benefit. This may include blogs, podcasts, publications, presentations or other forms of outreach activity.

If sponsoring organisations have any queries regarding the commitment a Professional Fellowship might represent, they are encouraged to contact the scheme representative for either RLUK members or The National Archives, given in *Section 8: Further Information* (below).

### **3. Hosting a Professional Fellow**

One of the key components of the Professional Fellowship Scheme is a short-term residency within an organisation that is not the Fellow's home institution. Depending on where the Fellow originates from (i.e. their home organisation), this will be a short-term residency within The National Archives (for Fellows from an RLUK member) or at an RLUK member (for Fellows from The National Archives). It is intended that both the fellow and host organisation will derive significant benefits from the Professional Fellowship Scheme.

The envisaged benefits include:

- Raising of their respective profiles as centres of expertise;

- Enable the opening of new strategic conversations that may not otherwise occur;
- Identify new potential partnerships for joint initiatives or markets for their respective services;
- Improving corporate processes and procedures through engaging in critical friendship and their contextualisation within a wider organisational setting.

It is in everyone's interest that the short-term residencies associated with a Professional Fellowship proceed as smoothly as possible. In hosting a Professional Fellow, the host organisation therefore has a number of responsibilities to the Fellow, which are detailed below.

### **3.1. Role of the Host Organisation**

It is the role of the host organisation to provide an embedded professional experience to the Professional Fellow within their organisation. They should support the Fellow in enabling them to place their practice and expertise within a wider organisational and professional environment. In order to do so effectively, it is expected that the host organisation will:

- Provide a named mentor within the organisation who will be responsible for liaising with the Professional Fellow throughout their Fellowship and on the approach to, and throughout, their residency. Mentors should also nominate a colleague at the host organisation who will serve as a 'critical friend' during the Fellowship and who can take over as mentor in the event they are unable to fulfil this role (e.g. due to ill health or if they leave the organisation before the end of the fellowship);
- Provide appropriate desk space and resources to enable the Fellow to work within the organisation during their residency;

- Arrange the necessary security clearances and checks in order to provide the Professional Fellow with access to buildings and resources required for their residency;
- Allow sufficient time within staff schedules to enable the Professional Fellow to meet with relevant colleagues in support of their fellowship;
- Provide a safe and welcoming environment in which the Fellow can work.

If a potential host organisation has any queries or questions regarding their role within a potential Professional Fellowship, they should contact their scheme representatives named in *Section 8: Further Information*, below.

#### 4. **Guidance for Mentors**

One of the key features of the Professional Fellowship scheme is the allocation of a named mentor to support the Fellow throughout their fellowship. A definition of this position is given below:

Mentors: will be responsible for the support and peer mentoring of a Professional Fellow within another organisation. They will not participate in the CPD elements of the scheme or a residency in an organisation outside their own. Being a mentor therefore allows an individual to participate in the Professional Fellowship scheme without the commitment of being a Fellow. They will still be expected to facilitate a residency of a Professional Fellow within their organisation and support the latter in the undertaking of this.

Mentors are to support a Professional Fellow in the development of their professional practice project over the course of the Fellowship. This will include offering peer support and mentoring. In doing so, Mentors will be expected to:



- *Be in regular contact:* Mentors and Fellows should be in regular contact with their mentees throughout the period of the fellowship. We would recommend that Fellows and mentors arrange regular telephone or face-to-face catch-ups every month (as a minimum) or more often as required based on the individual needs of the Fellow. These should increase in their regularity on the approach to the Fellow's residency in the host organisation to ensure that maximum benefit is secured.
- *Facilitated residency:* Mentors will be responsible for arranging and facilitating the residency of their mentee within their own organisation. This will include ensuring that appropriate security checks and clearances have been secured for the visiting Professional Fellow, resources (e.g. desk space) have been allocated, and a programme of activity has been developed (aligned to the professional practice question being considered by the Fellowship).
- *Time allocation:* Mentors and Fellows should allocate adequate time to support a visiting mentee. The time required to do this will vary depending on the nature and intended outcome of their Professional Fellowship and the timing and contents of their residency. Mentors should discuss the time commitment required for these elements with their line manager and head of department, and where appropriate, have this responsibility included within their performance objectives.

If Mentors have any queries or questions regarding their role within the Professional Fellowship Scheme, they should raise these with the scheme representatives named in *Section 8: Further Information*, below.

## **5. Financial allocation**

Following the success of their stage two, full application, Professional Fellows will be awarded a financial allocation of £1,500. These funds will not be held by the Fellow,

but will be held centrally and administered by RLUK on behalf of the scheme. They are designed to limit the financial burden on participating organisations.

This allocation is to support the fellow for the duration of the Fellowship and can be used for the following:

- *Travel and Subsistence:* To support the Professional Fellow in their travel and subsistence when undertaking their exchange at their host organisation. Travel and subsistence bookings will be made on behalf of the Fellow by RLUK and requests must be made on the scheme booking form and in accordance with The National Archives Travel and Subsistence Policy (for TNA staff) or in accordance with the policies and regulations of the RLUK member organisation (for staff of an RLUK member). Questions relating to travel and subsistence bookings can be made to: [melanie.cheung@rluk.ac.uk](mailto:melanie.cheung@rluk.ac.uk), RLUK, Executive Assistant.
- *Other Fellowship expenses:* To cover other expenses in support of the Professional Fellowship (e.g. to buy resources, attend a course or workshop, or to support the delivery of outreach activity). Such claims should be agreed with the sponsoring institution and the Professional Fellowship Scheme representative before payment is made.

The financial allocation should not be spent on any other activities without the permission of the Fellowship Board. If additional finance is required to support the Fellow's activities, applications should be made to their sponsoring (home) organisation through established channels.

As mentors will not engage in the majority of Fellowship activities (e.g. a residency, CPD activities) and their role is largely restricted to the peer mentoring and facilitating a Fellow's residency within their institution, no monies have been allocated to them within the scheme.

## **6. Monitoring and evaluation of Professional Fellows**

### **6.1. Monitoring**

The progress made by Professional Fellows against the aims and objectives of their fellowship should be monitored over the duration of the fellowship. Details of how Professional Fellowships should be monitored are given within the *Professional Fellowship Scheme Guidance, Section 6.2*.

Line managers and mentors should regularly review the progress of the fellowship against its stated aims and objectives. The success of a fellowship will be judged against these, as given within the Fellow's initial application. If the aims and objectives of a fellowship need to be modified or changed over its duration, these should be discussed with a Fellow's line manager, mentor, and their scheme's representative given in *Section 8*.

### **6.2. Evaluation**

The success of a Professional Fellowship will be judged against its aims and outputs, as stated within the fellow's application, or those agreed during the duration of the fellowship. The comments of the Fellow themselves and their line manager will be taken into account when evaluating the fellowship, in addition to any outputs/documentation produced. Comments will also be sought from mentors and corresponding fellows as further context. A certificate of completion will be awarded to the Fellow on behalf of The National Archives and RLUK, which can act as evidence of a Fellowship having been undertaken.

### **6.3. Grievance procedure**

If any party, whether the Fellow, line manager, or mentor have concerns regarding the progress or nature of a Professional Fellowship, the concerned party should raise it with the other parties at the soonest possible moment, and with their scheme representative where appropriate. Wherever possible, issues and difficulties should be resolved informally between parties or within the established grievance procedures of the Fellow's sponsoring organisation. If, for whatever reason, these cannot be resolved, a Professional Fellowship can be terminated.

## **7. Termination of a Professional Fellowship**

A Professional Fellowship can be terminated by the Professional Fellow or their line manager by their making a request, in writing, to the scheme board given in *Section 6.2* of the *Professional Fellowship Scheme Guidance* via their scheme representative detailed in *Section 8, Further Information*, below. This request should include the reasons for termination and the efforts made to resolve any issues encountered. Where appropriate, a request may be made to the fellow's sponsoring organisation for the repayment of monies allocated to the fellow up to that point.

## **8. Further information**

For further information, please see the scheme's guidance material or FAQ document. If you are considering an application and would like to discuss this further, you may also contact your scheme representative:

For colleagues at a Research Libraries UK member:

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For colleagues at The National Archives:



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