Planning & Organising; Problem Solving; and Decision Making matrix

All roles have a level of decision-making, planning and organising, and problem-solving. This matrix has been designed to support consistency across the University, align with our grade profiles, and help you clearly describe the responsibilities of the role.

When you complete the job description, please use the Matrix to populate these sections with the grade level of responsibility that best reflects the expectations of the role. You must use the same grade for all three sections. **You must not edit, add or delete (unless at UE06) any points.**

Grade 2 1
Grade 3 2
Grade 4 2
Grade 5 3
Grade 6 4
Grade 7 4
Grade 8 5
Grade 9 6
Grade 10 7

Grade 2

Planning & Organising

- Complete basic tasks to set time and quality standards by following clear instructions.
- Work under direct supervision; tasks and priorities are assigned for the shift/day.
- Organise own work within the given list; seek guidance before changing the order or approach.

- Use simple checklists (where appropriate) and update the supervisor/manager on progress, issues, or delays.

Problem Solving

- Follow prescribed steps to resolve straightforward problems.

Decision Making

- Work within clear instructions and direct supervision.
- Comply with standard procedures.
- Refer non-routine matters to supervisor/manager.

Grade 3

Planning & Organising

- Work to well established routines that meet time and quality standards under regular supervision.
- Plan routine tasks across the day with work priorities being allocated by a supervisor/manager.
- Make routine arrangements and may prepare standard materials using templates; coordinate straightforward details with others.
- Refer any unusual or non-routine situations to supervisor/manager.

Problem Solving

- Resolve common recurring problems using established guidance.
- Gather missing information to complete tasks.

Decision Making

- Prioritise own daily tasks within established procedures.
- Select from predefined options.
- Seek advice outside standard guidance/process.

Grade 4

Planning & Organising

- Plan and organise own workload in line with established procedures, processes and timelines across the day/week.

- Work with minimal supervision to meet service deadlines and quality standards; adjust to changing team/unit needs.
- Work within set procedures, using judgement to sequence tasks and manage timing; escalate nonstandard work or conflicting demands to a manager.

Problem Solving

- Resolve day-to-day problems independently using procedures and experience.
- Make minor adjustments within existing processes.

Decision Making

- Prioritise work over days/weeks within defined parameters.
- Judge when to pass queries on to others.
- May be accountable for quality in an operational area.

Grade 5

Planning & Organising

- Plan and prioritise own workload over the week (and, where relevant, month).
- Work mainly within established procedures and with minimal supervision to meet service deadlines and quality standards.
- Coordinate the scheduling and delivery of routine activities or workflows.
- Use initiative to respond to changing priorities and exceptional demands by reordering tasks and resources; escalates nonstandard issues or risks in good time.
- May organise required information/documentation for planned activities or events, ensuring resources (e.g., equipment, materials, bookings) are in place.

Problem Solving

- Resolve most routine problems independently.
- Diagnose cause before selecting a solution.
- Escalate complex matters with options/recommendations.

Decision Making

- Use initiative to make day-to-day operational decisions with minimal supervision.
- Adjust priorities in response to changing demands within policy.
- May allocate routine work to others.

Grade 6

Planning & Organising

- Plan own work and, when appropriate, the work of others, weeks to months ahead. Prioritise, resolve conflicts, and adjust plans to meet deadlines and standards with limited supervision.
- Oversee the day-to-day running of a defined area or workstream. Schedule activities, allocate work and resources, and may provide guidance and supervision.
- May lead small projects or contribute to a defined part of a larger project. Contribute to milestones, track progress and escalate significant issues promptly.
- In supervisory roles, ensure the right people, equipment and information are in place. Maintain clear schedules and records to support handovers and reporting.

Problem Solving

- Resolve a range of routine problems mostly within established processes escalating where required.
- Analyse information from a variety of sources to determine solutions.
- (Professional Services only – delete if not appropriate) Propose and implement improvements to current working methods.

Decision Making

- Exercise independent judgement within a broad policy and systems framework.
- Balance competing short-term priorities for self (and sometimes team).
- Recommend and justify actions using analysis.
- (Academic only – delete if not appropriate) Make decisions within defined parameters/methodologies within established programmes.

Grade 7

Planning & Organising

- Plan and lead delivery of projects (which may be short-term) or defined workstreams. Set scope and milestones, assign tasks, manage dependencies and risks, and keep delivery on time, to standard and within budget.
- Design and manage team and/or individual workflows and schedules over weeks to months but with a contribution to development over a longer period. Balance people, equipment and space, and reallocate work to meet targets and turnaround times.

- Oversee day-to-day operations of a service, facility or area. Set and maintain standards, monitor performance and resource use, resolve issues promptly, and ensure compliance.
- Improve ways of working by reviewing procedures.
- Gather and analyse requirements, implement agreed changes, and contribute to annual planning.

Problem Solving

- Identify gaps in information and conduct analyses to solve/resolve problems and issues with short-term consequences.
- Put forward recommendations on managing more complex situations.
- Acts as a source of expertise.

Decision Making

- Make independent professional/specialist decisions affecting a defined service or discipline.
- Set and monitor local standards/objectives and take remedial action where required.
- Contribute to development of policy/practice/curriculum.

Grade 8

Planning & Organising

- Plan and direct team or area activity months to a year ahead, setting priorities and schedules that align with School, Department or area plans.
- Lead projects typically impacting up to department/school level. Define scope and outcomes, set governance, manage risks and dependencies, and deliver to agreed time, quality and budget.
- Allocate time and resources across concurrent activities; balances workloads, monitor progress with clear measures and takes corrective action when required.
- Continuously develop and implement procedures and improved ways of working; anticipates future needs, prepares proposals to secure resources and ensures compliance.

Problem Solving

- Lead solutions in complex, specialist or sensitive problems requiring innovation.

- Redesign systems or develop improved methods where existing approaches are insufficient.
- May lead resolution of issues with cross-functional impact.

Decision Making

- Make significant decisions across projects/programmes/services.
- Balance risk, resources, quality and stakeholder considerations.
- Lead decisions in delivery within strategic parameters within projects/programmes/areas.

Grade 9

Planning & Organising

- Shape strategic direction and plans of typically a year or more in advance for their area, aligning activity with wider strategy.
- Lead a portfolio of programmes, projects and/or core operations. Establish governance, allocate people and budgets, manage interdependencies across teams, and ensure delivery to agreed time, quality and cost.
- Prepare business cases to secure funding or other resources.
- Monitor performance and risk across the area, take corrective action, and coordinate change with stakeholders within and beyond the immediate unit.
- Embed effective processes, improved ways of working and compliance.

Problem Solving

- Lead solutions to novel, functional, academic or organisation-wide problems with limited precedent.
- Integrate strategic, financial and regulatory considerations.

Decision Making

- Exercise substantial independent authority over a function or academic field.
- Develop and implement operational plans, policy and processes and contribute to long-term plans.
- Decision materially affects direction and resource allocation.
- Answerable for the service delivery of area of activity.

Grade 10

Planning & Organising

- Set and lead the strategy, vision and multi-year plans for the area, aligning with university priorities.
- Direct and is accountable for major strategic programmes and change initiatives.
- Monitor performance, risk, and benefits across the portfolio. Take corrective action, steer complex change, ensure compliance, and represent the area in University-wide policy and planning.

Problem Solving

- Responsible for developing and delivering the strategic plans for their area.
- Will typically influence and shape future direction, strategy and objectives of the University.
- Resolve the most complex strategic challenges ensuring internal and external requirements are met.
- Diagnose institutional issues with long-term implications and implement solutions.

Decision Making

- Hold ultimate decision-making authority for a major strategic, academic or operational area.
- Initiate and establish policy with institution-wide implications.
- Accountable for long-term performance and external compliance for major strategic, academic or operational area.