Project Management For Academics

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Foreword

This document has been put together by academics, for academics. It is not a definitive guide. It contains the tips, advice and practice of those who have already managed academic projects successfully.

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Define Your Project

A project can be something very simple, or a massive undertaking. The language of fellowships and grants hints at many things. Useful questions to ask at the start of any academic project include:

- **What's the point?**
- **Where's it going to take you?**
- **What's it going to lead to?**
- **What will be the outputs as well as outcomes?**
- **What are the most important things to deliver?**
- **What are the added extras?**
- **How will keep you focused?**
- **Where will it take your field?**
- **Who will it benefit?**

The Project Lifecycle
Manage Yourself

Before starting a project, think about your skills and your weaknesses. If you’re used to getting away with doing things at the last minute, think again. When working on big projects with stakeholders and collaborators you have to be organised and accountable. It will be a steep learning curve, so don’t ignore the fact you’ll need to develop new skills.

→ **Start with a plan**
Develop a really well thought-out plan. This can, and will, change throughout your project but it will help you (and others) understand exactly what your aim is and how you’ll achieve it. If possible, conduct a test run or feasibility pilot. This will help you spot any mistakes and oversights, and will give you more confidence. It may also make you aware of competing or complementary projects.

→ **Choose the right tools**
There are many project management systems to choose from and selecting the right one can mean the difference between liberation and constraint. Given that most academic projects are complex and unique, don’t try to force yours through an unfriendly generic process. Work through the project stage by stage, and design something that will make life easier.

→ **Focus on what matters**
Keep your project goals in mind all the time. Break down your work into manageable pieces. Do a small number of things well and then build on these. Don’t leave things unfinished: complete outputs as you go along, focusing on quality not quantity.

→ **Make mistakes**
And don’t be afraid to do so. Be honest. Don’t hide your mistakes. Tell people straight away and ask for help.

→ **Don’t get isolated**
Find someone who has already been there and done it. They will be able to save you time and money, and prevent you making silly mistakes. Seek out training opportunities, enrol in a mentorship programme, and join leadership groups and committees. By looking outside your field for advice and support you’ll build a reliable network and gain perspective.

→ **Get professional help**
From: departmental, faculty and research staff; Research and Innovation Services; Finance; the Media Team; Human Resources; Faculty Research Gateways etc. Don’t be afraid to ask – get your money’s worth!

→ **Understand processes**
Make sure you understand the processes that will affect the day-to-day management of your project. For example, if you’re new to the University, or need to move funds/resources to another centre, make sure this is going to be possible before you make the arrangements.

→ **Update your profile**
Check your profile and keep it up-to-date. If you have a departmental website (or other) that’s difficult to maintain, provide a link to your preferred pages. Update this with news of new papers, presentations, students, collaborators and grants. Funders, collaborators, employers and students will use your webpage to build a covert impression, so make sure you present yourself at your best. Think about the images you’re using (do you really want a picture of yourself with Homer Simpson on your academic webpage?). It’s important to
provoke, excite and gain attention but make sure you’re sending the message you want to send. If you’re not sure, ask a colleague for advice.

→ **Reflect constantly**
Evaluation shouldn’t just take place at the end of a project. It’s not just down to a process and plan. Reflect constantly on any possible problems and come up with inventive strategies to resolve them as soon as possible, rather than hoping they will resolve themselves – because they don’t! If you can’t resolve them until a later date, make sure that all stakeholders (including the ‘hidden’ stakeholders e.g. the project sponsor’s manager) are aware of the risk. Constantly scrutinise and aim to improve, especially where people performance is concerned. Get the small things right to make the project run easier.

→ **Monitor**
Have an excellent record keeping system in place. Keep the resources, inventory and budget under constant review and make sure they are aligned to timescales and outputs. Be prepared to revisit decisions.

→ **Work out if you actually want to be a project manager**
Some people don’t. There may be someone on your project who likes organising and tracking, so you could consider sharing some responsibilities. In addition, funders are now more open to providing funding for project managers.

→ **Make time for serendipity**
Don’t just stare yourself blind on the promised outcomes. Allow serendipity to do its work, and allow yourself to explore (if only once a year) something that isn’t in the plan and that does not link directly to the project outcomes, especially if it gives you the opportunity to start new collaborations. This can work wonders and is especially useful for people who work much of the time on their own.

→ **Be kind to yourself**
You won’t always be right, things won’t always go to plan, you won’t get on with everyone, and it will always take longer than expected!

**Useful Project Management Tools**

→ **Work Breakdown Structure**
A work breakdown structure (WBS) can be an essential tool. You need to decide on the work packages (which is usually easy) and the WBS helps you break this down into a hierarchy of tasks. For example, see: [http://www.dummies.com/how-to/content/how-to-create-a-work-breakdown-structure.html](http://www.dummies.com/how-to/content/how-to-create-a-work-breakdown-structure.html)

→ **Timeline management: MS Project**
MS Project is easy to use and incredibly useful for the diagrammatic work plan Research Councils require. It provides a great ‘Day 1’ plan to work from if the project is funded. The software looks complicated, so people don’t always give it a chance. However, you don’t need 99% of the functionality for it to be a really useful tool. All you have to do is list the tasks you need in any particular work package (identified in the WBS) think about how long each one is going to take, and assign a resource (PDR1 or PHD2 for example). You can then drag all the blocks around and diagrammatically design your work programme. The key is to keep it simple and link the tasks that require the same resource together. That way, if you decide a task requires an extra time, everything else is updated automatically and you can easily see if
something doesn’t make sense or if you haven’t allowed enough time in the overall project. If you’re on a managed computer you can access and install this through the Software Centre.

→ **Productivity: Lucid Charts**
Lucid offers far greater flexibility (compared to the standard word offerings) when making things like flow charts for your project proposals and presentations. It’s intuitive, easy to use and produces professional-looking figures. Sheffield has a licence. To access - go to your Google Email – go to the google apps icon in the right hand corner – go to ‘more’ – the Lucid Charts option will appear.

→ **Document sharing: Google Drive**
Google Drive can be essential to create a really logical folder tree structure (like planning out a book by the chapters you intend to write). Share it with the project team and insist they populate the drive with appropriate documentation. Without careful recording of data, academic projects have no useful outputs. Recording the data like this can be the best/easiest way and it means it will be available to return to in years to come. Sheffield has a licence. To access - go to your Google Email – go to the google apps icon in the right hand corner – the Google Drive option will appear.

→ **Presentations: Colour palettes**
Did you know you should only use three colours in a presentation? The colour wheel helps you to choose complementary colours that will make your presentation look smart and professional: [https://color.adobe.com/create/color-wheel/](https://color.adobe.com/create/color-wheel/)

**Reading**

→ The Lazy Project Manager  
[https://www.amazon.co.uk/Lazy-Project-Manager-productive-office/dp/1906821674](https://www.amazon.co.uk/Lazy-Project-Manager-productive-office/dp/1906821674)

→ Art of War  
[http://www.managethatproject.com/artofwar-pm.html](http://www.managethatproject.com/artofwar-pm.html)

→ The One Minute Manager - Increase Productivity, Profits And Your Own Prosperity  
[https://www.amazon.co.uk/One-Minute-Manager-Productivity-Prosperity/dp/0007107927](https://www.amazon.co.uk/One-Minute-Manager-Productivity-Prosperity/dp/0007107927)

[https://www.amazon.co.uk/Managing-Difficult-People-Survival-Handling/dp/1593371861](https://www.amazon.co.uk/Managing-Difficult-People-Survival-Handling/dp/1593371861)

**Mentoring**

→ **Mentoring for Research Staff**, will match you with a mentor outside your department who can help support you through all stages of your career:  
[http://www.sheffield.ac.uk/ris/ecr/mentoring/index](http://www.sheffield.ac.uk/ris/ecr/mentoring/index)

→ **Impact** is a 6-month mentoring programme for female Lecturers who are mentored by Professors or other senior staff members:  
[https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/impactfutures/impact](https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/impactfutures/impact)

→ **Futures** is a 12-month mentoring programme for senior academic women who are mentored by Pro-Vice-Chancellors or other senior staff members:  
[https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/impactfutures/futures](https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/impactfutures/futures)

→ **The CAMPUS Mentoring Programme** is a cross-role and faculty/department programme available to staff on grade 8 and above:  
[http://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/campus](http://www.sheffield.ac.uk/hr/sld/developmenteverywhere/coachmentor/campus)
Hire Excellent Staff

Hiring good staff is arguably the most critical phase of any project. Don’t let a CV and a thirty-minute interview force you into a decision you may later regret.

Work out what kind of a team you want to build
Do you want a tight/homogenous team (clones of yourself) or a broader diverse team that will bring different skills, ideas and insights? Both options have pros and cons. Think about this, and be clear what you want before you interview. When writing the job specification, think about the role your staff will take, as well as the tasks they will do.

The success of a project usually hinges on hiring good researchers
Pay great attention to CVs and ask plenty of carefully planned questions at interview to check your applicants are up to speed with the field. Ask candidates to provide a review of the current literature. Think about skills, ability and attitude. Skills and ability can be worked on and are probably easy to extract from the CV and interview questions. If someone doesn’t have the right attitude then there is no hope, yet this is the most difficult thing to assess at interview. Devise questions aimed at ‘weeding out’ people with bad attitudes towards work. People still use clichéd interview questions in industry to assess this; though it seems unpopular to ask them in academia. Get someone experienced to take part in the interview panel. Always read references and make additional phone calls if need be. Don’t (ever) appoint if you don’t get the right field!

Be proactive
Actively seek out people to join your team. Don’t just rely on jobs.ac.uk. Speak to people at conferences, ask colleagues to make recommendations, and make links with Masters and PhD students.

Advertising, recruiting and appointing takes more time than you think
Getting approval, drafting the About the Job, placing adverts, responding to enquiries, shortlisting, chasing references and interviewing (not to mention notice periods) takes months not weeks. If you need to hire someone on a grant, remember that you won’t even be allowed to place the advert until the money has arrived and a cost code has been allocated. Some departments (but not all) can offer bridging cost codes. Anticipate problems, find out your local processes and make sure you put time aside to deal with recruitment.

Use Pathway to Impact time
Add Pathway to Impact time to the end of the project. Then, if it takes longer to recruit than planned, the actual project can slip into the Pathway to Impact time. A reviewer might criticise a 2-year project being spread over 2.5 years, yet they won’t criticise a 2-year project having 0.5 year Pathway to Impact at the end.

Offer work placements
Advertise this on your website. Many students will look for unpaid work experience. Make sure you have a good, distinct project and give them the opportunity to show their worth. Sheffield schemes like On CampUS and SURE provide funds to pay the students and are a great way of testing the skills of future students and employees. Importantly, you can use these internships to gain team management experience - not having had your own team before can be a negative point for reviewers, and this is a way around it.
Work Experience Opportunities

→ ONCampUS scheme:
  https://www.sheffield.ac.uk/placements/students/oncampus
→ SURE scheme:
  https://www.sheffield.ac.uk/sure
→ Student Jobshop:
  http://www.shef.ac.uk/careers/students/jobs/jobshop

Recruitment Flow Chart

The figure above provides a simplified overview of the generic recruitment process. For full details on how to recruit go to:

https://www.sheffield.ac.uk/hr/recruitment/erecruitment
Manage Your Team

Managing people is hard. It can take time to strike the right balance between giving people autonomy, and cracking the whip to keep to milestones (especially when these keep moving).

→ Understand your leadership style
There are many different styles of leadership and it’s up to you to decide what you’re comfortable with. Trust your instincts and don’t try to copy the style of someone you admire because you won’t be able to maintain it. Honesty and consistency is important. Be prepared to be flexible though. Some situations can benefit from a more autocratic leadership style - even if it doesn’t fit with your personal preference.

→ Work closely with the researchers you hire
For many researchers, their employment with you is a finite experience and they’ll be looking ahead. They may have just taken the job to put food on the table. Giving your staff autonomy can help because they may not always have your enthusiasm for the project. Inspire and excite your staff and let them know their contributions are important. Don’t let a project tick away in the background while you write your next grant.

→ Hold regular meetings
Have regular standing meetings (e.g. once a week, same time and place) for the whole team and make these compulsory where possible. Make sure everyone contributes by asking them to present something, or by asking specifically for their comments. Create an environment where people feel comfortable by being inclusive, and encourage full and frank discussion. Don’t pour cold water on people’s ideas: lean in and listen.

→ Give your meetings purpose
Make sure your meetings have a purpose, for example, when you need to ‘brainstorm’ something or if different people’s work is very closely related. Group meetings so often become boring for most of the participants because they are rarely relevant to everyone’s work. One approach is to have 1 to 1 weekly meetings with each individual, write down what’s been agreed for the week and then make these notes available by means of a shared google drive folder. MS One Note is really good for this.

→ Retain your team
It will be natural to try to keep your best researchers working for you. This can be difficult because it often relies on having back-to-back funding. Unless you have continuity of funding to retain your staff beyond the life of your grant you may be faced with losing them. In order to keep your valuable team, you almost need to start applying for your next grant as soon as you’ve won your current one. Make sure they are involved with this process a) because they will learn from it, and b) because they won’t take it to heart if they know it’s not personal.

→ Look after the best
If you can retain good staff, be fair about their career progression. Find win-win situations, so the person’s work progresses both the project and their career. Help them to become independent researchers (and therefore eligible to apply for their first grant or fellowship) and be clear about what esteem factors are needed to be competitive. Help them to focus on getting good publications, write smaller grants and be Co-I on larger bids. Provide ‘side-line’ projects so they can publish without you as a supervisor (especially important if your RA was your PhD student too). Support their applications to spend time abroad at the best institutions in their field.
→ **Assign Responsibility**
Assign a specific practical responsibility to each RA (in line with their strengths/interests) and let them lead on that bit (for example, external engagement, conference or workshop organization etc.) so they get the experience and credit. Research does get stuck and having a side project (that’s relatively easy and will get lots of praise) keeps people from taking this too hard/personally. Plus, whenever your staff feel the need to procrastinate, they have a useful way to channel it!

→ **Welcome newcomers**
A new person can make significant changes to a team (forming, storming, norming and performing). Be kind and patient, and encourage other team members to do the same. Make your expectations very clear from day one. Some academics write an ‘unofficial handbook’, to show their take on the university’s working conditions – working hours, ways of working, etc. Have weekly one-on-ones until you’re happy they’ve settled and understand what’s expected. After someone is well into a project, still have one-on-ones, but try your best to only ask questions and not give advice/instructions (it’s really hard to do this, but a great way to allow them to develop).

**Team Management**

→ **Staff Review and Development Scheme** process:  
https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/srds

→ **Staff Review and Development Scheme** skills for reviewers:  
https://www.sheffield.ac.uk/hr/sld/developmenteverywhere/azdirectory/srdsreviewers

→ **Doctoral Academy** information for supervisors:  
http://doctoralacademy.group.shef.ac.uk/wp2/info-for-staff/

→ **Fierce Conversations** Team model:  
https://www.sheffield.ac.uk/hr/sld/manage/core  
http://www.fierceinc.com/programs/team

**Team Selection**

→ **Belbin Team Model**: Belbin identified nine different behaviours that individuals display in the work place. For a team to be successful it is suggested that it needs to have access to each of the 9 Belbin Team Roles. Typically, most people have two or three Team Roles that they are most comfortable with; a few others that they can manage to cover if they need to; and finally the rest that they prefer not to adopt at all:  
http://www.belbin.com/about/belbin-team-roles/

→ **Myers-Briggs**: The purpose of the Myers-Briggs Type Indicator personality inventory is to make the theory of psychological types described by C. G. Jung understandable and useful in people’s lives:  
https://www.mbtionline.com/

**Team Performance**

→ **The Deal** reward and recognition:  
https://www.sheffield.ac.uk/hr/thedeal
Choose Your Collaborators

Great collaborators are outstanding contributors to the research effort; poor ones can have a legacy effect. If the relationship fails, what happens to great work that could lead on from the initial project? What happens to publications and data sharing? What happens if they are a reviewer on your future grant? The importance of taking the time to manage these relationships cannot be underestimated. Don't burn any bridges. Seek advice and involve a third party if necessary.

→ **Collaborate with 'the best'**
Get to understand and appreciate the key people in your field. Get people on board who are held in high esteem and who are influential: they really can help get your proposals funded and publications accepted.

→ **Engage your collaborators**
Make sure your collaborators are involved with the process. Ask them for critical feedback on papers and grant applications. If they're going to be long-term collaborators you need to make sure your needs are aligned. A silent partner is not a partner!

→ **Establish ground rules from the outset**
Be open and discuss the ground rules upfront to avoid misunderstanding. If you don't, any problems that may occur along the line will take a lot of time and energy to resolve. Who’s going to be an author on what paper, and in what order? Establish some ground rules about co-authorship. This is a potential minefield given different career stages and disciplinary conventions. Who’s going to be PI on any large, complex grant? Agree any institutional or departmental split in funding before a grant is awarded. You should include these details on URMS (or any similar system) to avoid/reduce potential misunderstanding.

→ **Get advice on sub-contracting**
Even if you know your collaborators from other institutions well, you don't know the constraints under which they are working. Gather intelligence and get as much planned and agreed as possible before you start.

→ **Manage the whole project**
Don't just manage your bit and expect people to manage theirs. It's up to you to keep track of everything that's going on (and going wrong). Don't expose yourself to surprises.

→ **Hold regular meetings**
If people in your team/collaboration are working remotely, try to have face-to-face meetings every four – six months (depending on the duration of the project) and rotate them around the different sites. Make decisions collectively and keep people feeling valued and their contributions relevant.

→ **Keep minutes**
If you don't keep minutes, you won't have a record of what's been discussed and agreed. If there are any misunderstandings, minutes can be a great non-confrontational way of providing 'proof'. Make sure you circulate these after each important meeting and ask people to check them.
Retain focus and stay in control
People can easily get distracted and lose focus, especially on projects that are not overly prescriptive. Find a common interest that can keep people centred. For example, taking a publication-led approach means people will collaborate for access to data and publications - this can bind people together. This is your project so don’t let anyone take over (senior or post doc!).

Collaborative Software

- **Wrike** provides tools that allow you to archive templates, documents and communication in a single secure location: [https://www.wrike.com/](https://www.wrike.com/)
- **Basecamp** offers a range of easy-to-use tools you can share with your collaborators including: to-do lists, message boards, group chats, storage of documents and files (including change history), schedules (with the ability to set deadlines and milestones), notifications and reports: [https://basecamp.com/](https://basecamp.com/)
- **Huddle** offers secure cloud collaboration. It allows you to manage files, tasks and team communication in one place: [https://www.huddle.com/](https://www.huddle.com/)
- **Trello** provides a visual place where teams can collaborate on projects: from the big picture to the tiny details, it’s easy to see the progress of everything. [https://trello.com/](https://trello.com/)
- **Toodledo** is a system of productivity tools which allows you to store your tasks, notes and ideas in one place: [https://www.toodledo.com/](https://www.toodledo.com/)

Key Components of Collaboration

Understand Disciplinary Differences

If you’re working on a project with someone from a different discipline you’ll need to understand and appreciate the differences in how they work. Siloing people or making assumptions will prevent you understanding these important distinctions.

→ **Different disciplines speak different languages**
Understanding what people’s definitions of things are (for example, what is an experiment?). Empower the team to feel comfortable in their disciplinary expertise and part of the bigger team project. Deliver, and make sure everyone feels you’re delivering as well. People will have different achievement criteria.

→ **Ask stupid questions**
Ask stupid questions to people on your projects that are in a different discipline. Be reassured that you have an understanding of their work and how it impacts yours.

→ **Get technical**
Changes in technology can happen at a rapid pace so keep up to speed and ensure that any technical aspect of your work is still going to be fit for purpose by the end of your project. Don’t take for granted that things will work just because someone says it will. Get a second (or even third) opinion. Keep a close relationship with your technical team and let them know about any changes to the project.

→ **Research differences**
In some disciplines, researchers are used to working on their own, whereas for others this is not an option. The pace of the discipline can change how, where, and in what format, people publish. Transparency also changes across disciplines and can often be measured by the competitiveness of the discipline (Biologists, for example are notoriously secretive). Rather than make assumptions, ask people to define their role and expectations, and provide information in relation to, for example, use of data.

→ **Differences between academic and non-academic environments**
There are key differences between and academic non-academic measures of success. Take for example, testing a new product. To an academic, the focus may be on the integrity of the study and the ability to report clear findings, regardless of whether the product proves successful or not. A project that doesn’t work is not a failure in academia, but not reporting the output is. Publications, reputation and the ability to generate future income are common key academic esteem indicators. Conversely, industry partners will be very keen to provide evidence that their product works (and may not want you to publish evidence to the contrary). Make sure you agree on what joint success looks like and factor in guidelines for cost, time, scope, quality, novelty and reporting.

There is radically different politics between industry and academia. If you talk about “research” to some people in industry they think the work is trivial and won’t engage. Similarly, if you talk about “development” in universities, people think it is too high a technology readiness level and something not-very-clever that belongs in industry. The terminology you use to describe the same work to different audiences can make a big difference, so seek advice from someone who’s already successfully worked at the academic-industry interface before you proceed.
Know your Stakeholders

Stakeholders are everywhere. Unlike your collaborators, they may not be engaged with your project and may be involved because they have to be, not because they want to be.

→ **Know who you you’re (really) working for**
This may not be your line manager. Find out who makes the decisions and who is acting as gatekeeper. It’s OK to ‘go above’ someone as long as you’re transparent about doing so.

→ **Get people to care**
Many people won’t care about the substance of what you’re doing and this leads to big questions about motivation. In some cases (like matrix management) you may also need to build a relationship with someone’s manager.

→ **Make friends**
People are more important than gantt charts. Be nice to people who pull the strings. People will get in the way, so think through what motivates them and how what you’re doing impacts their work. Don’t expect people to be as passionate or as bright as you are. Manage your and their expectations.

→ **De-jargon**
De-jargon everything! Take the opportunity to practice framing things in a simple way that everyone can understand.

**Stakeholder Analysis**

![Stakeholder Analysis Diagram]

Academic Stakeholder analysis articles:

→ [http://heapol.oxfordjournals.org/content/15/3/239.short](http://heapol.oxfordjournals.org/content/15/3/239.short)
Deal with Difficult People

People are the cause of most problems, and these problems are likely to be the ones that will keep you awake at night.

→ Watch out for problem researchers
Insecure researchers who won’t show you or discuss ‘poor’ data/information, or who won’t accept advice about manuscripts and presentations need to be managed carefully. If you can’t work things out, don’t renew their contract.

→ Be able to break bad news
There will always be conflict. It won’t go away if you ignore it. Be brave.

→ Keep in touch with people
You need to keep chasing people. Don’t assume they’ll just do their jobs. It may be they have a pile of things to do and your job’s at the bottom of that pile, or they may be stalling because they don’t know where to start. Either way, don’t sit around waiting, pick up the phone or go and see them and find out what’s going on.

→ Be fair
People will want their own benefits and will sometimes try to manipulate you to achieve their aim. Don’t allow people to exploit or feel exploited and don’t make assumptions - accept that there will always be misunderstanding.

→ Tackle problems quickly
If something isn’t working – a Research Assistant disappears for 2-3 weeks, or seems to be going off on a tangent - intervene early and find out what’s happening. There is often a good reason. Seek information and clarity. If necessary, get help from a trusted colleague (not necessarily HR as this may escalate, not diffuse a problem) and take the time to listen. Provide a supportive environment and help colleagues who are experiencing difficulties.

→ Don’t put off difficult conversations
Don’t be afraid to discuss problems and don’t let things fester. The longer you avoid it, the worse it will get. People will always have problems and it’s your responsibility to provide the right resources, support and signposting.

→ Don’t get involved in other people’s arguments
Don’t get drawn into personal disagreements and never take sides. Help people to resolve things between themselves.

"If you don’t like someone and don’t want to talk to them, walk a mile in their shoes. This way they’ll be a mile away and shoeless"
Communicate

We can all be better at communicating. It can take time and effort to get it right and be understood in the way intended.

→ **Don’t rely on email**
  Go and talk to people. Make friends with the person on the end of the phone.

→ **Give feedback**
  People always complain about lack of feedback, acknowledgement and gratitude. Use formal mechanisms (like SRDS) to set targets and milestones, and create informal opportunities (open door policies, regular meetings). Conversely, never wait to vent frustration/criticism just once a year, deal with those types of issues as they arise.

→ **Reward and incentivise**
  This doesn’t mean grand gestures, flowers and chocolates. Just remember to say thank you and well done. It will mean a lot!

→ **Socialise**
  Socialising can help to break down barriers. Have a kick off meeting - go for a meal after. Arrange coffee mornings, after work drinks and parties. People will appreciate the gesture and it will encourage compatibility.

→ **Give your undivided attention**
  Pay attention in meetings. For example, your student may have spent weeks on their work, so give them more than a few minutes of your undivided time to listen. Encourage document sharing (using, for example, Google Drive or MS One Note). This way you can catch up when you have the time rather than when the information is given/presented to you.

→ **Give deadlines**
  If you don’t provide deadlines people can’t meet them. However, deadlines need to be made carefully and should not look like arbitrary dictation. Conferences are good for providing ‘real’ deadlines, as are those set by sponsors/funders.

→ **Keep to deadlines**
  And do not cancel meetings at your whim.

→ **Communicate your priorities clearly**
  One of the most common complaints from staff is that their managers don’t tell them how their performance is being judged. *Will it be outputs or income? Journal papers or book chapters? Pure research or knowledge exchange?* They need to know these things from the outset, not at the end of the project. Don’t assume your staff will know what you want.

→ **Make the most of editorial tasks**
  Use editorial tasks as a way to show you can generate ideas that excite other people, and that you have the intellectual maturity and oversight to turn individual contributions into a coherent whole.

→ **Lead by example**
  Be clear and concise with what you share with your team and set the bar for how you want information to be given to you. If you raise your voice, belittle, gossip and bully, your team will react and you will get a reputation. Set professional behavioural boundaries.
Survive Grants

Writing grants can be frustrating and it’s likely that you’ll get more letters of rejection than success.

→ Grant writing is not the same as writing papers
Grant writing is, first and foremost, a sales pitch – written for academics by academics. Team up with someone you can learn from - even if you take a hit on authorship. Start by linking with a senior academic with a track record. This can be a critical starting place because you’ll see first-hand how experienced people write and you’re more likely to be involved with more substantial grants with the potential for greater scope and important collaborators. You will also use this formative experience to understand how projects (and people) function. This can be especially useful if you are struggling with the feeling of isolation which is common after leaving your PhD/post-doc supervisor. Working with different people and institutions can help you learn the different ways in which they work, and can help maintain the feeling of being part of a team.

→ Winning a grant rests on knife edge
One bad reviewer, one grumpy introducer can kill it. Don’t give up! If it’s a good idea but unfunded, revise it and try again: some proposals are reviewed three times before they’re funded. You might need to diversify your funding streams and move away from the standard RCUK model (for example ERC, Leverhulme). One academic reports: “In 2013 I came fifth and they funded four fellowships. The next year I re-submitted a slightly revised proposal and came first, above two professors. One of my colleagues in came fifth, with four fellowship projects funded, and he never tried again”.

→ Be realistic
When applying for funding, get the balance between ambition and reality. Show that, within the constraints of the funding, you can deliver an answer to a particular problem. Break things down into work packages for clarity and to show what you’re proposing can be achieved realistically. Explain clearly why each step is important and how it will help to answer the bigger question. People won’t get funded if they claim to be able to solve everything in one swoop. EPSRC, for example, wants the projects they fund to have a big impact on society but, they say, on a 5 – 50 year timescale. This means you can make fairly grand claims based on a realistic set of project deliverables.

→ Answer the question
Not answering the question is a common oversight. It can show you up to be ‘new to the game’ and can even be a deal breaker. For example, if the funder asks for aims and objectives, provide aims and objectives, not goals and milestones. Be careful when producing lay summaries. Remember that not all the panel members will understand your specific field so don’t start by giving them an overly complicated and technical statement. Tell them what the problem is, why it needs to be addressed and why you’re the best person to do it.

→ Make sure your applications are reviewed internally
Take the time to build a network of people you can rely on to provide you with honest and helpful feedback. Make sure you give your reviewers plenty of notice (four weeks is preferable) otherwise they won’t be able to give it the attention it deserves. Ask an (educated) lay person to review and proof read the final version of your application. They’ll be able to spot mistakes your expert reviewers may not have noticed.
→ **Prepare for interviews**

Never go to an interview unprepared. Arrange to have at least two mock interviews. Keep your presentation precisely to time – have a ‘buffer slide’ at the end in case you speak more quickly in the real interview than in practice. It makes sense to fill the time and make the most of your interview ‘sales pitch’ before the questions start.

→ **One thing leads to another**

Find out what’s going on in your field so you don’t overlap and you can retain your competitive edge. Be smart enough to spot opportunities (or threats) by keeping on top of the literature and then develop your ideas. Make time to read - schedule it, print it out, do whatever you have to do to keep up-to-date.

→ **Know your funder**

The funder’s web pages are very useful. They say what topics they’re funding, what’s going to get more funding and what’s going to get less funding. A lot of it comes down to them ‘selling’ justification to the government and media why they are spending tax payers’ money. Try to tap into the particular funder’s way of writing – imagine giving them things to write about when they justify themselves to their stakeholders. Talk to people who are referees, assessors, panellists. Trusts tend to want to build a relationship with the researchers they fund, so speak to their officers and get to understand the organisation really well. Create tacit knowledge: funders may not always advertise their core strategic priorities but they will tell you if you make the time to speak to them.

→ **Understand the rules**

Understand funders’ rules and expectations - these can be very different. For example, what are the eligible and ineligible costs? What is the scope for virement? These will differ from one funder to the next, as will their attitudes to compromise. Don’t rely on someone else to tell you all this. Avoid mistakes and costly assumptions by the reading numerous documents available, getting clarity from the funder and sitting down with someone already ‘in the know’. As a PI it’s your ultimately your responsibility to conform.

→ **Keep your funder informed**

Let your funder know if there’s a problem, for example, if your RA is on long term sick and you can’t replace them. They might not be able to do anything about it, but they need to know. Many funders (like the Wellcome Trust) like to support people throughout their career, so it’s critical to keep them updated and on-board.

→ **Understand reporting mechanisms**

Understand the reporting frequencies and mechanisms from the outset of the project and keep appropriate records to make sure you can complete these on time and with the correct level of detail required. Funder requirements on reporting vary, so again make sure you do your homework. Some are very lenient, while others are not (especially RCUK). Don’t give your funder any reason to think you’re not in control. Even the best managed projects can run astray - make sure you report what happened and what you did about it.

→ **Have a data management plan – share, archive or destroy?**

Different departments, faculties, projects, funders and collaborators will have different data management requirements. Good research data management practices will help you comply with the data management expectations of research funders, your institution and publishers. It also means you can build on previous research, and people new to your group don’t have to ‘re-invent the wheel’.
→ Get supporting data
RCUK like to see preliminary data, pilot studies and track record. (BBSRC need almost a paper worth of unpublished data in the application.) Borrow people’s (students) data to support primary hypotheses. Other funders (e.g. ERC) encourage you to be a bit more ambitious and might not place such an emphasis on this: a really good track record is ultimately most important.

→ Know your research ethics
Applying for ethical approval takes time. Writing proposals, securing informed consent and drafting participant information sheets are all time consuming and not as simple as they may first appear. Get help from someone who’s done it before, and ask to see some successful examples. Remember you have an ethical obligation throughout the project; it’s not just about securing access to people and data.

→ Forecast expenditure carefully
Be aware of any financial changes that might impact your budget. These may include: pay rises (annual incremental or promotion), increases in the cost of consumables or equipment, seasonal fluctuations in the cost of hotels, flights and venue hire. Learn how to get project budgetary information from uBASE/SAP, rather than relying upon administrators.

Research Support Tools

→ Research Data Management:
  https://www.sheffield.ac.uk/library/rdm/index

→ Financial Management:
  https://www.sheffield.ac.uk/finance/staff_information/help/research_finance/getting_started

→ uBASE
  https://www.sheffield.ac.uk/cics/cis/ubase
  https://www.sheffield.ac.uk/hr/bussol/support/ubaserefresher

Terminology Explained

→ Aim: something you hope to achieve through action. Aims should be Specific, Measureable, Achievable, Relevant and Time bound (SMART). For example “The overarching aim of this project is to increase employment by 10% by 2020 for people living in Sheffield.”

→ Objectives: describe the specifics. If an aim is what you are planning to achieve, objectives are the steps you’ll take to achieve this aim. Again, they should always be SMART and there are usually a series of them. They can often be used to helpfully break down a project into stages or work packages. For example “The first objective (0-3 months) is to gather and assess current employment statistics of people living in Sheffield.”

→ Goal: something important that you hope to achieve in the future, even though it may take a long time. For example “This project will help achieve an important UK-wide goal of reducing unemployment”.

→ Target: the exact result you intend to achieve by doing something. This often relates to figures (for example, money, or a particular amount or total). For example “This project will increase employment rates by 10%.”
→ **Ambition**: something you want to achieve in your future career: For example “*My ambition is to develop an international-reputation as a leader in employment economy research*”.

→ **Milestone**: a task of zero duration that shows an important achievement in a project. Milestones can show how a project is advancing even if you’re not familiar with the tasks being executed. They have no duration because they symbolise an achievement, a point of time in a project.

**Communication Software**

→ WebEx: 
  https://www.webex.co.uk/
→ Skype: 
  https://www.skype.com/en/