Working Knowledge

People & Roles

The Project Coordinator

by

Hearing the Voice

Durham University

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Strategic Award

‘The Project Coordinator’
A Project Short by Victoria Patton

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The Project Coordinator

What is required in order to provide effective administrative support to and leadership in an interdisciplinary research team? This Project Short focuses on the role of the Project Coordinator at Hearing the Voice, describing the main challenges and responsibilities of the position, as well as some of the administrative systems that have been put in place in order to help manage project activities. It also seeks to provide practical advice for those looking to appoint a Project Coordinator to manage their research project and those who might be considering taking on a similar role themselves.

Roles and responsibilities

One of the first decisions that were made when planning the logistical support for Hearing the Voice was the decision to split administrative duties across two posts: the Project Coordinator (Grade 6, 0.6FTE) and the Project Assistant (Grade 4, 0.4FTE). The Project Coordinator is responsible for the day-to-day management of the research project, and also works closely with the directors in order to develop the project's profile locally, nationally and abroad. The role is described in the job description for the position as follows:

> The Project Coordinator's main responsibilities will include: coordinating the project team to meet agreed project targets and milestones; liaising with relevant administrators in participating departments to monitor project expenditure and to manage the project budget; ensuring efficient and effective communication 'internally' and 'externally' with project partners and stakeholders (including mental health service users, clinicians and academic researchers); event management of project meetings, workshops, and conferences; developing the project web site and optimizing the dissemination of information through digital publications and social media; and coordinating the production of reports to funding bodies. The Project Coordinator will also line manage a Project Assistant (part-time).

By contrast, the Project Assistant provides general clerical and secretarial support to members of the project team. This includes organising travel and accommodation; coordinating catering and room bookings for meetings, workshops, seminars and conferences; coordinating purchasing for the project and processing staff and visitor travel and subsistence expenses; as well as other duties such as printing, photocopying and filing.

One of the advantages of this set-up is that it recognises that different aspects of project administration require different skills, qualifications and levels of responsibility. You won't attract dynamic people to a role that looks like it's largely going to be spent photocopying; at the same time, you can't expect people to manage a budget when they have relatively little experience in navigating university administrative structures. Ensuring that posts are appropriately graded according to your institution's guidelines is key. Whatever you decide about the division of roles, there are likely to be four key aspects to the management of any interdisciplinary research project. These are: (1) Budget control and financial management; (2) Event organisation; (3) Monitoring progress and reporting; and (4) Internal and external communications.

1. Budget control & financial management

One of the main challenges for the coordinator of any large research project is that of coming to grips with a complex project budget, and developing effective systems for planning and keeping track of project expenditure. This has been particularly difficult in the case of Hearing the Voice because the interdisciplinary nature of the project means that the budget for our non-staff costs is split across departments in the three different faculties of Durham University. As each department has its own administrators, systems and procedures for authorising and processing spend, we were concerned from the outset that running purchasing for the project through each separate department would make expenditure difficult to monitor and control.

In order to overcome this problem, we decided to centralise purchasing for the project and run all costs through the School of Medicine Pharmacy and Health; reallocating the costs on a quarterly basis to the other departments according to the ratio described in the original award. In doing this we have learned a number of lessons about financial planning and budget management that are likely to apply to any large-scale, multi-partner research project. These include:

◊ **The importance of flexibility.** It may not be possible to sit down at the beginning of the grant and map out a detailed budget plan which provides a breakdown of the projected costs of each research activity, and which will remain fixed for the duration of the project. For example, the direction of our research into voice-hearing and the kinds of conferences and workshops hosted by Hearing the Voice has evolved over time - it has been shaped by discussions and connections that are made during Voice Club, the developing interests of the postdoctoral researchers, the results of particular research studies, and collaborations with other projects and partner institutions. We have been fortunate through our Wellcome Trust Strategic Award to have had flexibility in our budget planning which allows us to seize unexpected opportunities when they arise, and to reallocate funds across different budget categories accordingly (within University guidelines and with the approval of our funders).

◊ **Records from the university's central finance department and the calculations received from databases like SAP and Oracle are not always up to date.** Keep an Excel spreadsheet of your own that details every item of expenditure (including the date and payment method) and the account code or cost centre it has been assigned to.

◊ **Effective filing and record-keeping systems are essential.** Keep electronic or hard copies of expenses receipts, purchase orders and invoices so that the audit trail remains clear and up-to-date throughout the duration of the project, and documents are easily accessible if required for spend reports.

◊ **Make time for regular (e.g. three monthly) budget meetings with the management team.** This might be difficult but it's essential to keep the management team up to date on actual, committed and projected spend, and alert them to any possible areas of overspend and/or underspend.

◊ **Check back with your funding body.** Make sure you have approval from your funding body if you are transferring funds between budget headings and are using funds for purposes not explicitly stated in the award. At Hearing the Voice, many of our research activities have required changes to our original budget and we have always experienced flexibility and support in approving these requests.

2. Event management

Another key aspect of the Project Coordinator's role is overseeing the organisation of events, including seminars, workshops, international conferences and public engagement events. This involves a variety of different tasks, ranging from managing the registration and advertising process for each event, to running final checks on equipment, accommodation and catering, to formulating evaluation questionnaires designed to measure impact and engagement.

As before, here are some practical considerations to bear in mind for anyone thinking of taking on a similar role:

◊ **Be realistic about the financial and human resources you can commit to each event.** Running a busy schedule of events is surprisingly time- and labour-intensive both for academic researchers and for administrative staff.

◊ **Get in early.** The best conference rooms and centres in universities get reserved months (even years) in advance, so book the venue for your conference or workshop as soon as you have a possible date in mind (even if this means you have to make changes to the reservation later).

◊ **Check university regulations.** Your university is likely to have restrictions on the caterers you can contract and the spend per head for entertaining invited guests. Make sure you comply with these as your funding body may not cover the costs if you haven't followed your own institution's procedures.

- **Automate where possible.** It is easy to use Google Docs and other online systems to set up electronic registration forms for conferences and events. This can help protect your inbox against email overload and also allow you to save time later as the registration information can eventually be used to generate delegate lists, badges and emails via mail merge.

- **Evaluate! Evaluate! Evaluate!** Reserve five to ten minutes at the end of each event to allow delegates to fill in a feedback questionnaire, or circulate an electronic version via email the next day while the event is still fresh in their minds. Even if you don't know exactly how at the time, the comments you receive may turn out to be extremely useful later, particularly when it comes to evaluating impact.

3. Monitoring progress and reporting

What's the best way to keep track of academic outputs and research progress when you're working with a large interdisciplinary team? How can you make sure that you get all the details of each individual's research activities when team members are working on different work packages and are dispersed across different locations? At Hearing the Voice, we ask our research team to complete twice-yearly progress reports (see the box below), the results of which are collated, analysed and summarised by the Project Coordinator. The Project Coordinator also plays an important role in making sure that academic outputs meet our open access requirements, and in drafting reports on impact funding, public engagement activities, and parts of the annual report for the Wellcome Trust.

4. Internal and external communications

One of the greatest challenges of coordinating a large interdisciplinary research project is that of making sure that clear channels of communication are established and maintained between the project directors and the wider research team. At Hearing the Voice, the Project Coordinator is the lynch-pin in this process, keeping the wider research team up to date with various HtV activities, coordinating people to take part in different events, and regularly seeking and relaying feedback on project activities from the other team members and the clinicians, voice-hearers and service users we engage with. To facilitate file-sharing we use Dropbox, and regular meetings of Voice Club allow the Durham-based research team to get together face-to-face and discuss different topics related to our research.

Email is often the primary method of communication within a research group, and we have thought

Creating a template for progress reports: What do you need to know?

Hearing the Voice researchers are asked to complete a simple form in Microsoft Word which asks for details of research outputs in the last calendar year. This includes details of written academic outputs (e.g. published articles, books, book chapters, opinion pieces); contributions to symposia, workshops and conferences; and any media or public engagement events. We also:

- Ask our researchers to include any work-in-progress: e.g. books, chapters or articles in the pipeline; papers submitted to/accepted for conferences; and plans to attend or contribute to specific events.

- To make the task less onerous, we make it clear to the team that responses don't need to be polished. Just the bare information will do!

- Include a reminder about the Wellcome Trust's policy on open access and what to do in order to make sure that research outputs meet with these requirements.

long and hard about how best to balance people's need to be kept up to speed with project developments with the need not to feel swamped, harassed or otherwise put upon by their inboxes. At Hearing the Voice, we try to keep project-related email traffic to a minimum while ensuring that no-one feels alienated or 'out of the loop' about the project as a whole. The Project Coordinator aims to send updates to the team no more frequently than once a week and our Project Handbook, which each team member received at the beginning of the grant, contains a section on email protocol (reproduced in the box below).

External engagement and raising the profile of the project through online tools and various forms of social media is an equally important aspect of the Project Coordinator's role, as the case study on the opposite page makes clear. You can read more about this aspect of the role in our our other Project Shorts [see **External Communications** and **Engaging Voice-Hearers**].

Hearing the Voice email protocol

We ask our team to consider the following protocol in handling Hearing the Voice emails:

- ◊ Think about whether email is the best medium for addressing an issue before using it.
- ◊ Use the HtV abbreviation in the subject line so that those who wish can use rules to filter project-related messages into particular folders.
- ◊ Use clear, comprehensive and specific subject lines so that people can easily file and retrieve emails.
- ◊ Try not to send emails (or expect replies) during weekends and major holiday periods.
- ◊ Copy in the minimum number of people required.
- ◊ Make emails as clear and to the point as possible.
- ◊ Indicate what you would like recipients to do with the message – e.g. reply by a certain date, forward suggestions to X, reply only if you dis/agree with a certain action.
- ◊ Don't forward emails unnecessarily.
- ◊ Auto-replies can be intrusive; please use them with consideration such as during periods when you would normally be expected to be available.
- ◊ Let us know if at any stage Hearing the Voice emails are overwhelming, unclear, discourteous, impoverished or otherwise unsatisfactory.

Case Study: My time at Hearing the Voice

When I first saw the advertisement for the role of Project Coordinator at Hearing the Voice, I had been juggling family life with part-time work as an administrator on a series of multi-partner research projects at Newcastle University for over three years. I felt ready to commit more time to paid employment, and was keen to apply for the position because it seemed like a great opportunity to get involved (albeit in a support role) in mental health research. Having lost a close family member to suicide and used mental health services myself, I feel very strongly that we need to reach a deeper understanding of what it is like to experience unusual mental states and improve the kinds of treatment and support available to those who seek or require it. So Hearing the Voice was right up my alley ...

I have a PhD in philosophy (acquired on a previous career trajectory) and although it is not essential for this role, I have found my academic background helpful for a number of reasons. Being able to understand and empathize with the aims of the research means that I can take on additional tasks such as writing content for the Hearing the Voice blog, website and e-bulletin; reporting on workshops and conference proceedings; and drafting press releases and reports for funding bodies, as well as helping to disseminate information about the project through various forms of social media. I've also had the privilege of representing the project at seminars, research showcases and public engagement events, and have enjoyed talking with clinicians, voice-hearers and members of the public about different aspects of our research, our anti-stigma agenda, and the various ways in which support can be made more widely available to people who find their voices distressing, both within the North-East and beyond.

In fact, one of the most surprising and exciting aspects of my role as Project Coordinator has been the way in which the communications and external engagement aspect of the position has developed over the last two years. My FTE has recently increased from 0.6 to 0.8, and I've had to expand my skill-set rapidly in order to keep up with the changing demands of the role. For example, I've become a dab hand with a Zoom H2N recorder, attended a course on academic podcasting, and learned how to edit and layer audio files in Audacity in order to produce an online series of lectures by Hearing the Voice researchers and guest speakers. I've also had the opportunity to develop my web development skills. Through taking on responsibility for the development of three different sites connected with the project, I've moved from being someone whose technical abilities were limited to a basic grasp of HTML, posting the odd blog post and making a few changes to a website, to someone who is confident with securing web hosting, setting up new domains, editing CSS and installing plug-ins and child themes on the self-hosted version of Wordpress.

I've had a lot of fun developing my skills in this way, and am hopeful that the communications aspect of my role will continue to develop in new and exciting ways throughout the final year of the first phase of Hearing the Voice.

Working Knowledge is a collection of accessible and user-friendly resources dedicated to the practical ins and outs of interdisciplinary research.

Covering everything from managing a research project's social media presence to conducting experimental design 'hackathons', the series is a must-read for anyone considering funding or embarking on interdiciplinary research.

Series editors: *Charles Fernyhough, Angela Woods and Victoria Patton.*