

Effective Researcher: Getting Started

Programme leader manual

Vitae resources: developing the
skills and careers of researchers

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Acknowledgements

Effective Researcher: Getting Started has been designed and developed by Janet Wilkinson.

The following materials have been used in, or have influenced, the development of this programme:

- My PhD: Let's get started! Developed by Janet Wilkinson and delivered by Janet Wilkinson and Paul Toombs at University of Ulster
- Learning Styles: Peter Honey and Alan Mumford
- Learning Cycle: David Kolb
- Getting a PhD: John A Finn
- The Seven Secrets of highly successful PhD students: Hugh Kearns
- The Seven Habits of Highly Effective People: Stephen R Covey
- In Five Years Time: Noah and the Whale
- Researcher writing programme: Mimo Caneapeel
- Effective Supervisor programme: Glasgow Caledonian University
- A 90-minute plan for personal effectiveness: Tony Schwarz, Harvard Business Review

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Overview of the programme

Overview and aims

This one-day programme is for researchers in the first 3-5 weeks of their doctorate. It develops a peer support for the start of their doctorate and provides tools and techniques for successful self-management and development to complete their research.

The learning outcomes of the programme are to enable researchers to:

- identify practical resources to help them manage and complete their doctorate
- build awareness of a development framework to use to identify current skills applicable to their doctorate and areas for further development
- identify and apply practical tools and techniques for self-management and time management of research activities
- understand the supervisor role and other stakeholders roles in their research and how to manage these relationships
- assess where their doctorate might lead after completion to inform actions they should be taking now

Type of resource

Programme

Recommended running time

Half day – one day

Audience

This material has been written for postgraduate researchers (PGRs)

Background

Since the introduction of the programme 'How to be an effective researcher for postgraduate researchers' much has changed in the researcher development environment.

'Effective Researcher: Getting Started' has been developed to form part of the Effective Researcher suite of programmes, which include:

- Effective Researcher – How to be an effective researcher for postgraduate researchers
- Effective Researcher – The Next 90 days
- Effective Researcher – Effective Progress
- Effective Researcher – The End is in Sight

Positioning:

This course is:

- A standalone programme that complements the suite of Effective Researcher programmes
- For researchers at the outset of their doctorate (full-time, part-time or ProfD)
- Designed to focus on the first 90 days of postgraduate research
- Designed for up to 40 participants
- Designed to be led by one skilled facilitator to be the programme leader (with appropriate institutional support if an external facilitator)

Why should participants come on this course? What's in it for them?

Participants on this course will be in the first 30 days of their doctorate and will probably have attended other induction programmes introducing them to the Institution.

This programme has been designed to help them navigate some of the practical issues of their early days from a self-management perspective as they start to organise themselves and their research and think about how their supervisor relationship will develop.

Participants work with other doctoral researchers from different disciplines through a series of activities specific to this stage in their research. The purpose is to give consideration to skills and practices that they already have in their repertoire and to consider new ways to use these skills and new skills that they will need to acquire.

Room, layout and resources

Room:

A flat room (i.e. **not** a tiered lecture theatre) that will:

- Comfortably take the number of participants when seated in cabaret style, which is roughly double the space required for lecture style.
- Permit flexible working – pairs, fours, the whole course.

Layout:

- During the course, layout should be flexible with moveable tables and chairs (ideally one table for every four participants).

Resources:

- **Stationery:**
 - Small notebook and pen for each participant.
 - Flip chart stand, paper and pens.
 - Data projector and laptop if using the accompanying slides.
- **Vitae resources to give out: 1 per participant:**
 - The informed researcher booklet
 - The Balanced Researcher booklet
 - Doctoral Planner
 - Vitae Researcher Development Framework postcards

Researcher Development Framework learning outcomes

These are the learning outcome areas as mapped on to the Researcher Development Framework (RDF).¹ For conditions of use for the RDF please refer to www.vitae.ac.uk/rdfconditionsofuse.

The RDF is a professional development framework for planning, promoting and supporting the personal, professional and career development of researchers in higher education. It articulates the knowledge, behaviours and attributes of successful researchers and encourages them to realise their potential.

A primary outcome is defined as an outcome that is likely to be achieved by all participants irrespective of how the resource is presented. A secondary outcome is that which might be achieved but to a lesser extent than a primary outcome and will vary from participant to participant depending on how the training activity is delivered and what focus is presented.

Domain A: Knowledge and intellectual abilities		
A1 Knowledge base	P	S
1. Subject to knowledge		
2. Research methods – theoretical knowledge		
3. Research methods – practical application		
4. Information seeking		
5. Information literacy and management		
6. Languages		
7. Academic literacy and numeracy		
A2 Cognitive abilities		
1. Analysing		
2. Synthesising		
3. Critical thinking		
4. Evaluating		
5. Problem solving		
A3 Creativity		
1. Inquiring mind		
2. Intellectual insight		
3. Innovation		
4. Argument construction		
5. Intellectual risk		

Domain B: Personal effectiveness		
B1 Personal qualities	P	S
1. Enthusiasm		
2. Perseverance		
3. Integrity		
4. Self-confidence		
5. Self-reflection		✓
6. Responsibility		
B2 Self-management		
1. Preparation and prioritisation		✓
2. Commitment to research		
3. Time management		✓
4. Responsiveness to change		
5. Work-life balance		
B3 Professional and career development		
1. Career management		✓
2. Continuing professional development		
3. Responsiveness to opportunities		
4. Networking		
5. Reputation and esteem		

Domain C: Research governance and organisation		
C1 Professional conduct	P	S
1. Health and safety		
2. Ethics, principles and sustainability		
3. Legal requirements		
4. IPR and copyright		
5. Respect and confidentiality		
6. Attribution and co-authorship		
7. Appropriate practice		
C2 Research management		
1. Research strategy		
2. Project planning and delivery		
3. Risk management		
C3 Finance, funding and resources		
1. Income and funding generation		
2. Financial management		
3. Infrastructure and resources		

Domain D: Engagement, influence and impact		
D1 Working with others	P	S
1. Collegiality		
2. Team working		
3. People management		✓
4. Supervision		
5. Mentoring		
6. Influence and leadership		
7. Collaboration		
8. Equality and diversity		
D2 Communication and dissemination		
1. Communication methods		
2. Communication media		
3. Publication		
D3 Engagement and impact		
1. Teaching		
2. Public engagement		
3. Enterprise		
4. Policy		
5. Society and culture		
6. Global citizenship		

Primary (P) and secondary (S) outcomes highlighted (✓)

¹ www.vitae.ac.uk/rdf

Introduction for the programme leader

About you:

This course has been designed to be run by an experienced facilitator working with an audience of postgraduate researchers.

What we mean by an experienced facilitator. You should be able to answer yes to both of the following questions:

1. Have you been a tutor/facilitator on any Vitae course e.g. GRADschool, Effective Researcher, Broadening Horizons or equivalent experiential learning course?
2. Can you adapt your presentation, (programme content), to respond to participant responses or requests?

Your role:

Your role as programme leader is to help participants:

- Think about the activities in a structured way.
- See the relevant context for the material in the context of their own institution and doctoral relationships.
- Relate what they are doing on the programme to their personal circumstances.
- Make the most of the knowledge of other participants involved in the session.

Responsibilities:

In advance of the programme you should:

- Familiarise yourself with the programme.
- Ensure that you are aware of the programme activities and the learning outcomes
- Have a discussion with the institution that is running the programme to establish how it fits with their overall programme of provision.
- Liaise with the institution regarding the suitability of the venue and participant profile
- Agree with the programme organiser the resource requirements for the programme (audio visuals, catering and special/extra materials).
- Liaise with the programme organiser on a regular basis to confirm participant bookings.

During the programme you are responsible for:

- Supporting the development of participants.
- Introducing and debriefing activities appropriately, and providing the learning context for the participants.
- Setting up and clearing away activities.
- Agreeing with the course organiser who will post out the follow-up postcards six weeks after the end of the programme.

After the programme you are responsible for:

- Identifying activities that worked and areas that could be improved within the programme.
- Having a discussion with the institution on the outcomes of the programme and considering any actions that will need to be taken to support its future delivery.

What the programme leader manual contains

This is the 'master pack' for the programme leader and contains all the activity summaries and notes that you will need to lead the programme.

The programme leader materials are written in an informal style because the culture of the course is relaxed – you will be encouraged to dress casually and to create a relaxed and fun environment for your team and the participants.

There are suggestions at relevant stages for handouts of Vitae materials and it would be useful to have the following documents on a one-per-participant basis:

- Doctoral Planner
- The Informed Researcher booklet
- The Balanced Researcher booklet
- Researcher Development Framework materials/postcards

How the programme leader manual is structured

This manual is delivered as a guide rather than a definitive set of actions.

The programme contains 12 separate activities and the accompanying slides indicate the flow of the material which follow the travel of a clock face: the underlying message is that even at induction stage 'the clock is already ticking' in the doctoral process and a good start *can* lead to effective use of time and completion within funded timescales.

The programme has been written as a half-day session (c. 3.5 hours) to fit in with other activities that may be happening as part of an institution's induction programme.

As a result, each movement of the clock face is designed to last c.15 minutes – i.e. 12 x 15 minute activities plus some contingency time.

Each activity is structured as:

- Title: includes overall timing for the session.
- Purpose: defines the key aims and objectives of the session.
- Process: provides an overview of activities and any other relevant information.
- Resources: lists all the resources you require to complete the session successfully.
- Detail: contains relevant guidance, supporting notes, discussion points and background information to be able to facilitate the session.
- Suggested additional activities: complementary to the main activity.

The course is designed to be informal, discursive and able to include an institutional perspective in every section if there are local or specialist contributors available. By using the suggestions at the end of each section there is the opportunity to turn this into a 6-hour course (i.e. full day running 9.30 am – 4.30 pm with an hour for lunch at 12.30pm) by supplementing each section with either the suggested activities or allowing more time and discussion for each activity.

Programme timetable overview

Session 1: Introductions and thinking about your first 90 days

Get to know each other and clarify the process for the course

Session 2: Identify your preference

Understand how you prefer to work and can manage yourself effectively

Session 3: Pick the right resource to help you

Identify practical resources to help you complete your doctorate

Session 4: Thinking about how you prefer to learn

Understand learning theory and how this can apply to their doctorate

Session 5: Thinking ahead - the longer term

Assess where their doctorate might lead after completion to inform actions they should be taking now

Session 6: Considering the skills you want to develop

Build awareness of a development framework to identify current skills and areas for development

Break

Session 7: The seven secrets of highly successful PhD students

Identify and apply practical tools and techniques for self-management of research activities

Session 8: Thinking about your own time management

Understand your preferences for time management to inform self-directed management

Session 9: Further time management thoughts.

Identify and apply practical tools and techniques for time management

Session 10: Supervisor: more than a 10-letter word

Understand the supervisor role in their research and how to manage the relationship

Session 11: Stakeholders in your doctorate

Identify stakeholders in their doctorate and need to effectively communicate with them

Session 12: Accomplished - begin with the end in mind

Develop their individual plan for the next 90 days

Programme timetable: 3.5 hours total

Time:	Activity:	Process:	Learning:	Ideal numbers:
	Arrival of participants and refreshments	Reception.		
T0	Welcome/Housekeeping	Presentation from programme leader		
T05 – T20	Activity One: Introductions and thinking about your first 90 days	Working in small groups exploring initial doctorate goals	The range of similar and different expectations	Ideally 3-4 per group.
T20 – T40	Activity Two: Identify your preferences	Whole group plenary with individual reflection	What do I bring with me into the doctorate in terms of preferred styles?	Individual.
T40 – T50	Activity Three: Pick the right resource to help you	Whole group plenary	There are helpful resources available beyond the institution	
T50 – T65	Activity Four: Thinking about how you prefer to learn	Whole group plenary and individual reflection	Where will my doctorate make use of preferred styles and develop other areas	
T65 – T80	Activity Five: In five years time....	Whole group plenary and small group discussion	Beginning a doctorate with the end in mind can help with deciding which additional activities to engage in along the way	
T80 – T95	Activity Six: Considering the skills you want to develop	Whole group introduction of the RDF	There is a structure and framework for skills development in research	
T95 – T110	Break			

Time:	Activity:	Process:	Learning:	Ideal numbers:
T110 – T135	Activity Seven: The seven secrets of highly successful postgraduate researchers	A series of short individual exercises and group discussion	Tactics for reading and writing in an academic environment	Individual. Pairs. Small groups.
T135 – T145	Activity Eight: Thinking about your own time management	Individual reflection and small group discussion	Tactics and preferences for time management	
T145 – T160	Activity Nine: Further time management thoughts	Whole plenary introduction and small group activity	Effective behaviour follows from effective habits	Groups of 3-4
T160 – T175	Activity Ten: Supervisor: more than a 10 letter word	Small group discussion and feedback	Active supervisor management is important from the start	Groups of 3-4
T175 – T190	Activity Eleven: Stakeholders in your doctorate	Small group discussion and feedback	There are a wide range of people with an interest in the doctoral process	Groups of 3-4
T190 – T205	Activity Twelve: ACCOMPLISHED. Begin with the end in mind	Whole plenary introduction. Individual reflection and postcard	Forward planning is important to completion within agreed/funded timescales	Individual
T205 – T210	Wrap up and close			

Notes for the course organiser

Before the course:

Obtain:

- Small notebook and pen for each participant
- Vitae publications
 - Doctoral planner
 - The Informed Researcher booklet
 - The Balanced Researcher booklet
 - Researcher Development Framework postcards
- Enough postcards and envelopes for one each per participant to be completed during the programme and sent out 6 weeks later.

Book relevant catering for arrival/mid-course.

The hour before the programme starts:

- Check that you have the resources for the day's activities
- Check on expected number of participants
- Set room out: ideally
 - Small tables with 4 chairs per table
 - Flip chart and pens at the front of the room
 - Data projector and laptop set up to use accompanying programme slides
- Set up projector – slide 1.

Welcome/Housekeeping

(5 minutes)

Purpose

Introductions
Set the scene for the programme
Administrative arrangements and timings

Process

Led by the programme leader:

- Introduce the programme delivery team.
- Set the scene for why the institution is running this programme and the overall purpose of it.
- Talk about the content at a high level (slide 2)
- Talk about the process for learning (discussion in pairs and groups and individual reflection). (slide 3).
- Talk about making notes during the session and the nature of accompanying handouts for the activities. (slide 4)

Resources

Small notebooks; one per participant.

Detail

Who are we?

- Introduce the programme delivery team.

Each facilitator says a little about themselves and where they are from:

- Who you are.
- Your background.
- Your experience of working with postgraduate researchers.

Why are we here?

Set the scene for why the institution is running this programme and the overall purpose of it.

This is for participants:

- To understand some of the skills required for their route to managing their own doctorate and thinking about why they are doing a doctorate.
- To set existing skills in context and identify new skill development areas
- To meet other people in the same position as them.

How will it work?

Talk about expectations of what is required from both the facilitator team and the participants on this programme.

From the delivery team:

- We will create a safe environment for you to learn.
- We will give you some input and advice.
- We will give you the opportunity to discuss common issues.

From participants:

- We need your participation.
- Respect for each other and the process.

Note that the emphasis is on a safe environment; this may require specific mentions if visitors from the University (or elsewhere) are present, or/and facilitators are known to participants.

The focus for the session is to look at getting started effectively in some of the behaviours required for doctoral research. (There will be a break halfway through the session).

Slide 2: The focus of the course is the 'individual':

- The session will cover how we prefer to learn
- It will consider self-management and work-life balance issues in undertaking the doctorate
- It will consider a development plan for the skills required to complete a doctorate
- It will consider the doctorate in a series of 90-day segments – focusing on the first 90 days.

Slide 3: The process for the course

- The programme will involve
 - Some input from the front (approx 20% of the total session)
 - Whole group discussions
 - Small group discussions
 - Individual reflections (totalling approx 80% of the session)

Slide 4: a note about notes

- Distribute the notebooks: one to each person
- Talk about the importance of having a notebook (or note taking device) with you at all times to be able to record thoughts, creativity, reflections.
- Outline that there will be additional Vitae resources distributed during the session and other resources referred to; participants will be encouraged to note details down to be able to refer to after the session.

Identify any publications that are available to take-away from the session.

Suggested additional activities:

- Representatives from the institution could make an additional welcome to the doctorate and set the session in context of the wider training programme available at the institution.

Session one: Introductions and thinking about your first 90 days (15 minutes)

Purpose

For participants to get to know each other and set the scene for the process for the course

Process

Introduced by the programme leader and wrapped up by the programme leader
Small group discussions

Structure

Introduction	2 mins
Group discussion	8 mins
Wrap up	5 mins

Resources

Vitae Doctoral Planner

Detail

Introduction:

Slide 5:

- The session has a focus on the ticking clock.
- We'll be looking at 12 different sessions and looking at *some* aspects of the doctorate from a high level.
- We'll move quite quickly: the point of the session is to look at some key themes and there will be a chance for participants to create action plans to find out more or do more at the end of the session.
- The point of induction, training and development for doctoral researchers is to help them complete their doctorate, do it within their agreed/funded timescales and make the most of the training programmes available to help them to do their doctorate and move on afterwards into their chosen career.

Slide 6:

- The first activity is to introduce yourself to each other and start to think ahead over the first three months.

Group discussion:

Slide 7:

- You have 10 minutes.
- In your groups of three please introduce yourselves to each other and say a little about the research you are starting.
- Expand the discussion to encompass what your expectations are for what you'll achieve in the first 90 days.

Wrap up:

With slide 7 still on the screen:

- Bring the small group discussions back to one whole group.
- Ask for participant comments from the whole group to be able to capture 3-5 key points from the whole group about goals for the first 90 days of the doctorate.
- Opportunities for discussion:

- Are the goals realistic?
- What will help?
- What will hinder meeting those goals?

Slide 8:

- Why think in 90-day segments?
 - A 3-year doctorate can seem like a long time (but the clock is already ticking!)
 - How quickly is the time passing already?
 - What things are taking longer than you'd anticipated?
- Outline the thinking behind the 90 day segment approach to project management:
 - It helps to chunk the doctorate and plan at a high level and allocate tasks to quarters rather than specifying weeks/months.
 - A 90-day period allows you flexibility to make progress at a steady rate whilst giving regular
 - Major tasks can be assigned to 90 day periods e.g. first 90 day period – *reading and literature review*, second 90-day period *starting to design research methodology*, third 90-day period – *thinking about ethics*
 - It can help you plan backwards by beginning with the end in mind – allocating writing up periods, viva etc to different quarter can start to illustrate when the major periods of activity will be in between.
 - You can start to think about when you are likely to go to conferences and take holidays – spreading your 6 weeks holiday over 4 x 90 day periods.

Suggested additional activities

There is the opportunity to give each group flipchart paper and pens and ask them to prepare a poster of 'first 90 day goals' and then ask 3-5 groups to present their thinking back to the group for a more detailed debrief and discussion *before* the wrap up.

Session two: Identify your preference (20 minutes)

Purpose

For participants to think about how their natural preferences for work will affect their working days during their doctorate and consider what they may need to be aware of to manage themselves effectively.

Process

Plenary introduction.
Individual activity and reflection.

Structure

Introduction	2 mins
Individual description and reflection	13 mins
Comparing notes in groups	5 mins

Resources

None.

Detail

Slide 9:

- This second activity is designed to think about how you are going to manage yourself and how you prefer to work.

Slide 10:

- Although we are all capable of a range of behaviours we have preferred styles that are our 'default' behaviours. This next activity encourages you think about where your preferences will take you during your doctorate.

Slide 11:

- The slide will initially show five green lines with arrows at each end.



- Ask participants to replicate this on a page in their notebooks.
- Outline that you are going to cover five spectrums of preference and you'd like them to put a mark on the line that represents where their preference is – close to either end, closer to the middle but with still a clear(ish) preference or right in the middle.
- Talk the participants through the different spectrum positions:
 - **First preference:** prefer to plan to work in a similar pattern each day vs. prefer to see how you feel on the day to decide what work to do.
 - **Second preference:** Like to have a detailed plan vs. Can't bear planning.
 - **Third preference:** Get started straight away vs. prefer to think first then do.

- **Fourth preference:** I'll get my doctorate finished on or before the deadline vs. I haven't given it much thought.
 - **Fifth preference:** I've already got a system for my references vs. I'm waiting to see what everyone recommends.
- The point of doing this activity is for participants to establish:
 - what their preferences are
 - the impact that these might have on their (self-directed) working environment as a doctoral researcher
 - how they might learn how others manage themselves and the benefits that this might have for managing in a research environment (and this might be different from previous environments they've worked within).
 - The options are to go through all five spectrum positions first and then debrief in a wider group or to take each one in turn and debrief the advantages and disadvantages in research of each position.
 - E.g. first preference: it is helpful to have a plan but not always easy to plan and work in a similar way each day in a research environment due to the emergent nature of some work. So, there needs to be a balance between managing personal expectations of being able to work in a similar structured way as this may not always be possible and, likewise, having no plan of where you need may allow responsiveness but won't help towards achieving goals over a 90 day period.
 - Debrief each preference by asking the group about differences and similarities and 'what is needed for research?' and what are the advantages and disadvantages of each position.
 - There should be sufficient flexibility within the time to allow small paired debriefs to 'compare notes'.
 - Wrap up the section by emphasising that no position is the 'right' one, that we can learn from other people's differences and outlining that if anyone hasn't sorted out how they are going to manage their references that the Library usually run regular courses to learn how to use Endnote.

Suggested additional activities:

Rather than asking participants to just think and write the activity down this would provide a good opportunity to create a physical continuum in the room by designating sides of the room that would be aligned to each end of the spectrum and asking participants to place themselves in a physical position along the continuum.



Session three: Pick the right resource to help you (10 minutes)

Purpose

To outline to participants that there are a range of resources available to help them as researchers and to highlight practical resources to help them complete their doctorate.

Process

This session will focus on three resources that will be able to help them.

Structure

Presentation and whole group discussion

10 mins

Resources

Vitae publication: The Informed Researcher booklet.

Detail

Slide 12:

- Introduce the section: looking for additional practical resources that will help you with process of managing yourself through your research.

Slide 13:

- There are a range of resources to be able to help you as a researcher. Spend some time at the beginning finding out the type of help that would be most useful to you.

Slide 14:

- Show the Vitae website homepage for postgraduate research.
- Talk about what Vitae does and the resources available for researchers at all stages of their doctorate.

Slide 15:

- Highlight that Vitae provide a range of helpful and targeted booklets to assist in the research process.
- Outline the contents of 'The Informed Researcher booklet' and why it would be useful to have access to this information at the *start* of the doctoral process.
- Hand out copies of the booklet one-per participant and allow a couple of minutes for participants to quickly scan the contents.
- Indicate that there are other helpful resources of the same type and point out their availability if you have them on the day or how to download a copy of them from the Vitae website.

Slide 16:

- Highlight that it is often useful to read a book that covers the whole process – from starting the doctorate to Viva so that you can get an overview of what is involved in the whole process of doing a doctorate.
- The book 'Getting a PhD' by John A Finn is used on this slide, as a typical resource but there are a variety of alternatives available.
- Ask the whole group if they have seen any additional books/bought them/had one recommended that they'd be happy to share with the rest of the group.

Wrap up the section by emphasising the amount of additional help available and mention the role of social media in helping with a doctorate.

- The Vitae blog posts and other relevant blogs.

- Twitter – particularly @Vitae, @thesiswhisperer, @PhD2Published, @LiteratureReviewHQ, @Vivasurvivors, the Institution’s twitter feed, research councils, relevant journals and other researchers in their field.

Suggested additional activities

This session could be further developed to include a more detailed discussion of social media and its usefulness to researchers (referencing the Research Information Network’s resource: ‘Social Media for Researchers’).

Alternatively:

If there were the opportunity of a guest speaker it would be a useful juncture in the programme to invite a 10-minute presentation from a subject-specific librarian to outline the services on offer for researchers in the University Library. This gives the participants the opportunity to understand the role of the subject specific librarian for their area (even if it is a librarian from another specialism who does the presentation) and the role of the library for researchers. It also complements ‘The Informed Researcher’ booklet handed out in this session.

Session four: Thinking about how you prefer to learn (15 minutes)

Purpose

To outline that there are different approaches required in the process of research and that personal preferences for learning may affect starting points and different levels of comfort with approaches required by supervisors and the process of research.

Process

This is a lead facilitator introduced session followed by small group discussions and whole group debrief.

Structure

Introduction	6 mins
Individual description and reflection	7 mins
'What does this mean?' wrap up	2 mins

Resources

None.

Detail

Slide 17:

- Step 4 is about the four broad ways in which we learn.

Slide 18:

- In this section you'll be asked to consider how you prefer to learn.

Slide 19:

- This section concentrates on the work of Peter Honey and Alan Mumford and the four learning styles they identified in adult learners; it was used by David Kolb to illustrate the cycle of learning that incorporates each preference in the process of learning and embedding learning.
- This slide builds starting at stage 1.
- Talk through the different stages using the slide descriptions as a broad guide (more detail exists on slides 20-23).
- Ask participants to think about their preference as you go through the four slides of description that follow.

Slide 20:

- To highlight how participants with a preference for 'activist' learning might approach research. (Pause at the end of talking through to give participants time to make notes or reflect).

Slide 21:

- To highlight how participants with a preference for 'reflector' learning might approach research. (Pause at the end of talking through to give participants time to make notes or reflect).

Slide 22:

- To highlight how participants with a preference for 'theorist' learning might approach research. (Pause at the end of talking through to give participants time to make notes or reflect).

Slide 23:

- To highlight how participants with a preference for 'pragmatist' might approach research. (Pause at the end of talking through to give participants time to make notes or reflect).

Slide 24: Brief the group discussion

- Allowing 7-8 minutes for discussion ask participants to have a short discussion with each other on any or all of the three questions listed:
 - Where do participants think their preferences lie?
 - Where are the areas of challenge going to be?
 - How will this affect them during their doctorate?
- Bring the whole group together to debrief 3-5 key points on the topic to wrap up the session. Emphasise that this is only a very broad and brief overview to give everyone something to think about (and find out more information if they want to).

Suggested additional activities

This section could be further developed by asking people to get into four groups related to their main preference and to consider advantages and disadvantages for this preference in a research environment, draw a poster that encapsulated their preference and then debrief each group's perspective one by one. Maximum group size for this activity should be c.6 people i.e. have more than one group if necessary.

Session five: Thinking ahead - the longer term (15 minutes)

Purpose

For participants to give some thought to where their doctorate might lead after completion to inform actions they should be taking now.

Process

Brief introduction
Small group discussion
Whole group debrief

Structure

Introduction	1 min
Individual description and reflection	9 mins
Comparing notes in groups	5 mins

Resources

None.

Detail

Slide 25:

- This slide is about the dreaded interview question 'where would you like to be in 5 year's time?'
- Suggest to the whole group that this might be a good opportunity to swap some group members between tables to generate new groups.

Slide 26:

- To brief the group discussion.
- Ask participants to spend up to nine minutes discussing the question in their new groups (after having introduced themselves to each other).

Slide 27:

- To debrief the group discussion.
- Where do you think your doctorate is taking you?
 - Typical answers will include a job in academia, a role in science/industry, government roles influencing policy, teaching (and possibly 'I don't know').
- Why think about it now?
 - Because three years will disappear more quickly than you think
 - Because there might be some things you could be doing during your doctorate to help in the transition:
 - Develop employability skills/generic skills
 - Publish papers based on research
 - Get involved in public engagement
 - Undertake internships
 - Gain relevant experience and build a professional network
 - Keep CV up to day

Wrap up this session by leaving the question with participants to consider their own answer and those they heard from others and how they might develop this thinking during their doctorate.

Suggested additional activities

There is an opportunity to develop this activity by having a short invited speaker from the Institution's Careers Service to come and talk about their services for postgraduates and why it is important to think about career planning much earlier in the doctorate than many people think, outline the services and courses they offer for post grads and identify key contacts and resources.

Session six: Considering the skills you want to develop (15 minutes)

Purpose

To build awareness of a development framework to use to identify current skills and areas for development.

Process

Introduction of the Vitae Researcher Development Framework

Individual reflection

Paired discussions

Structure

Introduction

2 mins

Individual description and reflection

5 mins

Comparing notes in pairs or groups

8 mins

Resources

Vitae Researcher Development Framework postcards.

Detail

Slide 28:

- Highlight that a break is coming up after this activity!
- Outline that stage six is about thinking about skills development.

Slide 29:

- To brief the activity.
- Suggest that this is going to be an individual activity with the opportunity to discuss it in a pair/small group if people want to do that at the end.

Slide 30:

- Give out the Vitae Researcher Development Framework postcards – one per participant.
- Introduce the Vitae Researcher Development Framework to the participants.
 - Highlight that it is a framework collaboratively created and agreed by higher education institutions and other stakeholder organisations in the UK.
 - It provides guidance at a high level of all the knowledge, behaviours and attributes involved in being a researcher.
 - There are a host of resources provided by Vitae to help with this development conversation and skills identification and description.
- Give participants 5 minutes to look at the materials you've given them on screen and in postcard form and identify six skills they will have gained or developed over the course of their doctorate.
- After five minutes give participants the opportunity to share their thoughts and compare notes with one other person and to hear
- Announce the arrival of the break – allowing those who want to continue their discussion to go on with it and others who have finished to have a comfort/drink break.

Break: 15 minutes

Suggested additional activities

This session could be further developed by a short (10-15 minute) presentation/talk from a member of the team responsible for generic skills development for early career researchers at the Institution. This would enable participants to understand key contacts, the major training opportunities open to them in their first 90 days/first year and how to access information and book places on training courses.

Alternatively:

Use a range of Vitae resources to talk about the Researcher Development Framework in more detail to introduce it more fully to the participants.

Session seven: The seven secrets of highly successful PhD students (20 minutes)

Purpose

To identify and apply practical tools and techniques for self-management of research activities.

Process

Plenary session to introduce 'The seven secrets of highly successful PhD students' and two (short) practical skills sessions around reading and writing in an academic environment.

Structure

Introduction and 'The seven secrets'	5 mins
Reading academic papers	5 mins
Freewriting: outline, practice and debrief	8 mins
Wrap up	2 mins

Resources

None.

Detail

Slide 31:

- Use this slide to draw the parallel between 'Seven Habits of Highly Effective People' by Stephen R Covey and the work done at Flinders University by Hugh Kearns that takes some of the same thinking and applies it to the doctoral process.

Slide 32:

- This slide outlines 'The Seven Secrets of Highly Successful PhD Students'.
- Work your way through each point:
 - The session will cover supervisor care later in the process
 - We're going to talk a little about writing later in this section
 - Ask how you get to a stage where you can 'be realistic'
 - Have a look at a recently completed Thesis in your department
 - Talk to others further ahead on the doctorate than you
 - Check out your understanding with peers at the same stage
 - Work closely with your supervisor to shape your expectations.
 - Later sections in this programme will cover distractions, preferences for working and who can help.
- Indicate that the session will now cover a technique for reading...(and maybe ask if:
 - Participants have already established approach for reading?
 - Have supervisors had conversations about how best to read papers?

Slide 33:

- This technique was shared by a doctoral supervisor at Glasgow Caledonian University as one that helps to critically evaluate papers in the early days of doctoral research and one that he taught researchers he was supervising to use.
- It helps to read papers or documents whilst questioning the content and helping the reader to form their own voice and opinion on the usefulness or relevance of the content to their research.
- The first part is fairly standard practice:
 - Read the abstract, the first 10 lines and the last 10 lines to establish that the paper is relevant.

- The second stage is to put the paper to one side and consider 3-4 questions that the reader might want the paper/document/book to answer for them. E.g.
 - Is the methodology here one I could learn something from?
 - Does the author have a different perspective on the subject that I do?
 - Will I learn something more about a particular technique I want to consider using?
 - Reading the paper from beginning to end at this point with the 3-4 questions in mind helps to focus on the reasons for reading the paper.
- Readers can use a highlighter pen to mark points relevant to the questions rather than highlighting 'anything interesting' in the paper.
- It enables the reader to be able to write up their understanding of the paper in relation to the questions in 'their own voice' to record key points from the paper.
- This then gives the reader the opportunity to have something written to either send or use as an outline for discussion with their supervisor.

Two points for consideration:

- Either, outline this to participants and suggest it is something they might use or adapt for their own purposes or suggest a discussion within the group about the benefits of having a process for reading. What works for them?
- Depending upon time constraints in the session there is the opportunity to apply the technique to 'The Informed Researcher' booklet and debrief it within the group.

Outline that the next activity will focus on writing.

Slide 34:

- Ask the question: Does anyone do Free-writing at the moment?
- If yes – ask them to outline how and when they use it and why they do it?
- If no, or after people have answered this question, move on to outline Free-writing for the whole group and suggest that it is something we'll practice in the group. (Familiarise yourself with Free-writing before the session if it is not already part of your practice).
- Work through the slide contents providing instruction. Participants may want to write things down from the slide.

Slide 35:

- Tell participants that you are going to do this as a group, in silence, for 4 minutes. Ask the group where they might get 4 minutes from to write?
 - First thing in the morning
 - Whilst they are waiting for a tea/coffee to cool
 - As the last thing they do at the end of the working day/actual day
- Ask participants to prepare themselves to free-write by getting a pen and paper out ready (and prepare to do the activity alongside them).

Slide 36:

- To refresh the key points and leave them on the screen whilst undertaking the activity.
- Set a timer for 4 minutes (watch, phone – yours or a participant volunteer).
- Write for 4 minutes.
- Debrief the activity:
 - How was that for everyone?
 - What can you use free-writing for?
 - Creativity
 - Getting started on writing
 - Unblocking your head

- Seeing what you think about an issue:
 - E M Forster: 'How will I know what I think 'til I see what I say?'
 - Avoid staring at a screen having to form 'beautifully crafted' sentences and then getting distracted/procrastinate writing.
 - Small commitment that regularly exercises your writing practice.
- Also mention that there is the website 750words.com can provide a similar on screen service for writing for those who don't want to write by hand. (try it out yourself before you recommend it...)

Slide 37:

- Before you leave the '7 secrets...' section there is just the opportunity to revisit the point about being clear what a doctorate involves and what a plan might look like.
- This definition (a generic one that can be replaced by the specific one for the institution concerned) can be used for a brief discussion of:
 - What are the key points in this expectation:
 - Show ability to conduct original investigations
 - Test ideas – their own and others
 - Link to the wider field of knowledge
 - Properly supported and supervised
 - Three years of full time study
 - Original study

Slide 38:

- This is a generic plan for a 'typical doctorate' (although there is no such thing as a typical doctorate!)
- How does this compare to the plans participants have already put together?
- How much holiday does a postgraduate researcher typically take? (Discussion: 6 weeks guideline)
- What are the expectations for putting a plan together in individual departments?

Suggested additional activities

This session is quite tight on time and needs to move at a reasonable pace. As a result the suggested additional activities are to allow greater time for discussion and debrief of the sections amongst participants either in small groups or the whole group.

Alternatively

If you have time in the programme this would be an ideal time for a second year postgraduate researcher to talk for 10-15 years about 'what I know now that I didn't know at the start of my doctorate' which is likely to reinforce the points covered in this section and provide reassurance to the participants in the session.

Session eight: Thinking about your own time management (10 minutes)

Purpose

To understand your preferences for time management to help inform the self-directed management of your doctorate.

Process

Whole group introduction.

Small group discussions to reflect individual preference.

Structure

Introduction	2 mins
Individual description and reflection	6 mins
Comparing notes in groups	2 mins

Resources

Copies of 'The Balanced Researcher' booklet: one per participant.

Detail

Slide 39:

- Stage 8 is about thinking (very broadly) about eight aspects of time management.
- Suggest that there is the opportunity for formation of new groups of 4 within the overall group to stimulate further discussion/hear from different voices.

Slide 40:

- Set the scene by talking about your own preferences for time management and how this dictates your self-directed work.
- Give the groups a few minutes to consider the questions in groups as they relate to themselves.
- Debrief the session by picking up 3-5 key points from the discussions within the group, establish why knowing the answer to these questions is important as a self-directed postgraduate researcher and take the opportunity to focus on the subject of e-mail (referring to 'The Balanced Researcher' booklet about strategies for dealing with e-mail).

Slide 41:

- Hand out copies of 'The Balanced Researcher': one copy per participant.

Suggested additional activities

This is a short session that can be developed for a further 20 minutes of group discussion and report back by allocating one question per group (or if more than 8 groups allocating two groups the same question) for discussion, report back and whole group discussion.

Session nine: Further time management thoughts (15 minutes)

Purpose

To identify and apply practical tools and techniques for time management and its link with effectiveness.

Process

Brief introduction to the three questions
Small group discussions followed by debrief

Structure

Introduction	5 mins
What can a researcher do in 90 minutes?	5 mins
Debrief and discussion of 90 days	5 mins

Resources

Possible to provide copies of the Harvard Business Review blog article referred to: 'Why we should all work in 90 minute cycles' by Tony Schwarz or suggest that participants make a note of the article and Google it later if they want to read it.

Detail

Slide 42:

- Stage nine involves three questions – all relating to 'nine' things.

Slide 43:

- Ask participants as a group whether they are 'morning' or 'evening' people and whether they know their most productive time of day? Ask how this can be used effectively?
- Give participants 3 minutes in group discussions to come up with as many things that they can think off that they can achieve in 90 minutes in a research environment.
Debrief the answers (typically):
 - Read a paper and make notes
 - Write a first draft of some work
 - Have a productive supervisor meeting
 - Search for articles
 - Manage references
 - Set up an experiment
 - Design a questionnaire for data collection
 - Have an interview with a participant etc.
- Refer to Tony Schwarz's work (and his Harvard Business Review Blog Article <http://blogs.hbr.org/schwartz/2011/01/the-most-important-practice-i.html>) about why we are at our most productive when we work in 90-minute blocks.
- Use a similar process to establish what a researcher can achieve over a 90-day block of time. The following questions could prompt discussion about having a realistic plan:
 - How much can be practically done?
 - How much will you read?
 - What output will you have?
 - How many supervisor meetings will you have in that time?

Suggested additional activities

There is the opportunity to look in more detail at 'what can a researcher do in x minutes' looking at 'pockets of time' and expanding the middle section of slide 43:

- 15 minutes
- 30 minutes
- 90 minutes

Give the groups 2-3 minutes per time period to consider each time period debriefing their suggestions in between each period of group work. The purpose of this activity is to see the range of things they can come up with that researchers do as part of their work, how even small pockets of time can be put to good research use and how breaking up a day at work can help them to be more effective.

Session ten: Supervisor - more than a 10 letter word (15 minutes)

Purpose

To start to focus the discussion on the role of supervisor relationships in making a good start in the doctoral process.

Process

Brief introduction

Small group discussions followed by debrief

Structure

Introduction

1 min

What are supervisors for? Group discussion

8 mins

Debrief and discussion of the role of the supervisor

6 mins

Resources

Detail

Slide 44:

- Make the point that the programme is into the final quarter.
- This section is going to focus on managing supervisor relationships.

Slide 45:

- Ask participants to work in their small groups with the purpose of having 8 minutes discussion to come up with 10 things they need to consider in their relationships with their supervisors.
- Debrief the group task. The points may include or be prompted by:
 - Being clear about who their supervisor(s) are and the role of the second or subsequent supervisors in their research.
 - Identifying and agreeing a meeting pattern that suits everyone.
 - Identifying and agreeing a meeting location that suits everyone.
 - Considering how you'll handle communication and turnaround times between you.
 - Questions:
 - Are the meetings going to be semi-formal or casual in how they are arranged and when they take place?
 - Who will set the agenda?
 - Who will take minutes of the meeting?
 - Is there a need for a contract/agreement?
 - What will your supervisor expect you to do in between meetings?
 - How far in advance do you need to send your supervisor written material to be able to obtain feedback?
 - Does your supervisor expect you to produce a plan?
 - Does your supervisor expect you to publish during or after your doctorate?

Slide 46:

- Wrap up the session by emphasising the importance of:
 - Establishing a good relationship with supervisor(s) early in the doctorate
 - Include all supervisors as far as you are able to.
 - Flag up any problems for you and your doctorate or the relationship as soon as possible.

- Ask participants to reflect on the three questions on this slide in relation to their own research as they move through the first 90 days.

Suggested additional activities

This section lends itself to an experienced supervisor joining the session to give a 10-minute overview (either informal chat or slide led presentation of 'top tips') of how they start relationships within new doctoral researchers and how their experience has developed good and effective practices with the researchers they work with.

Session eleven: Stakeholders in your doctorate (15 minutes)

Purpose

To encourage participants to think of the wider communities (in research and beyond) that have an interest in their research.

Process

Introduction.

Individual reflection.

Group discussions and debrief.

Structure

Introduction

2 mins

Individual reflection and small group discussion

8 mins

Debrief and whole group discussion

5 mins

Resources

None.

Detail

Slide 47:

- The programme moves on to think about 'stakeholders' in a doctorate.

Slide 48:

- Ask the group to define 'stakeholder'
 - Someone who has an interest in the process or outcome of their research.
 - May be financial, may be output related, may be pastoral for them etc.

Slide 49:

- Set the group the discussion task of coming up with as many different stakeholder types as possible and to map them on a piece of flipchart paper to share back with the whole group at the end.
- Split the task into 1 minute individual reflection and note making and 7 minutes group discussion.
- Typical answers may include:
 - Me!
 - Supervisor(s)
 - Department
 - Funding council, Government
 - University
 - Research community, external partners
 - Parents or partner who are supporting me
 - Research participants
 - Ethics committee
- Wrap up the session by emphasising the need to communicate with stakeholders appropriate to their needs and requirements.

Suggested additional activities

This activity lends itself to creating a large stakeholder map over one wall. Providing each group with coloured cards that they can then complete with 'one stakeholder type' per card and stick on the wall to create a visual image of the stakeholder relationships brings the activity to life and emphasises the range and number of people and organisations with a stake in the doctoral process. (Duplicated stakeholder cards can be stuck on top of each other).



Session twelve: Accomplished - begin with the end in mind (15 minutes)

Purpose

To bring the course to a conclusion and set the follow up action plans for the participants.

Process

Group introduction.

Personal reflection.

Personal action plans and follow up postcards.

Structure

Introduction

1 min

Individual reflection and personal action plan postcards

8 mins

Debrief and whole group discussion, wrap up

6 mins

Resources

Follow up postcards and envelopes: one each per participant.

Detail

Slide 50:

- The clock has come full circle. Stage 12.

Slide 51:

- Revisit the concept that a doctorate is most often 3 years.
- Ask the broad question to the whole group: What do you have at the end of a doctorate?
 - Completed Thesis
 - Experience of a Viva
 - Publications (maybe?)
 - Experience
 - Certificate
 - Graduation
 - New opportunities....

Slide 52:

- Revisiting step 1

Slide 53:

- So, what do you think can be achieved in the next 90 days.
- Remind participants when 90 days from the session will be.
- Outline the task. Discussion and then action. Instructions:
 - Everyone will get a postcard and an envelope
 - Write a message to yourself on the postcard of something from this session that you want to be reminded of in six weeks time.
 - Seal the card in the envelope.
 - Put your home or work address on the outside of the envelope.
 - It will be sent to you six weeks today – half way through the next 90 days.
- Bring the whole group together at the end of the session to one group to wrap the session up.

Slide 54:

- Wrap up the session up by emphasising:
 - Self-knowledge will help to make you more effective.

- Focus on a few effective behaviours to help shape your first 90 days.
- Invest in the supervisor relationship.
- Keep in mind that ‘the clock is ticking...’
- Enjoy your doctorate and the opportunities it brings you for development.

End

Suggested additional activities

To be able to embed action plans for individuals, participants could spend 10 minutes in paired discussions (5 minutes in either direction) providing support and challenge for each other’s plans prior to completing the postcard.



About Vitae

Vitae is supported by Research Councils UK (RCUK) and managed by CRAC: The Career Development Organisation. Vitae's vision is for the UK to be world class in supporting the personal, professional and career development of researchers.

To achieve our vision we have four aims:

- building human capital by influencing the development and implementation of effective policy relating to researcher development
- enhancing higher education provision to train and develop researchers
- empowering researchers to make an impact in their careers
- evidencing the impact of professional and career development support for researchers.

Vitae's work with higher education institutions

Vitae works with UK higher education institutions (HEIs) to embed professional and career development in the research environment. Vitae plays a major role in innovating, sharing practice and enhancing the capability of the higher education sector to provide world-class professional development and training of researchers. We do this both through national projects and through Hub activities.

The programme develops resources for use by trainers and others working with researchers; and provides opportunities for HEIs to share information and practice; develop ideas and approaches; and work collaboratively.

For further information about the range of our resources, email resources@vitae.ac.uk or visit www.vitae.ac.uk/resources

For conditions of use please refer to www.vitae.ac.uk/resourcesconditionsofuse

For further information about Vitae, email enquiries@vitae.ac.uk or visit www.vitae.ac.uk