Getting the Most From Conducting Your Project Review

Guidance Booklet (Reviewers)

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INTRODUCTION

What is a Project Review Meeting?
A Project Review Meeting is an annual review meeting that concentrates on progress towards the goals of the specific research project.

Regular project reviews are both part of good project management practice (i.e. tracking project progress, keeping clear, open communication lines amongst project team members), and good people management practice (offering feedback, support, and discussion space for staff)

Any formal annual project meeting should be part of regular process of continual, informal project feedback/monitoring, and will be likely be complemented by regular (though perhaps more informal) project/team meetings through the project period.

Why Should I Have This Meeting?

Time for more formal reflection / progress
Being closely involved in managing a project can lead to heavy emotional involvement with its success and progress. It can be hard for you and your staff to step back and critically reflect, though reflection is vital to success. Review meetings are your chance to step back.

Check progress towards project objectives / milestones
Review meetings are a chance to help you and your staff reflect on “how are we doing?” Overall project goals and objectives, plus specific ‘milestones’, will likely have been discussed and agreed from the outset of the project. A review meeting offers the chance to discuss how your staff are progressing towards these.

You may wish to discuss and review:
- What’s gone well? What’s gone not so well?
- What to do differently in future? Ideas?
- What your staff have learnt from both successes, and challenges, so far?
- Given what they’ve learnt, what future actions might they take?

Set future milestones and outcomes / outputs / ‘deliverables’
Goal clarification, and re-clarification, is vital through out the lifecycle of a project. Do your staff know and understand them? Do they know where they should be aiming to be at the end of the project (as best as can be estimated/planned for?).

Do they understand the ‘deliverables’ i.e. the actual tangible outputs that are aimed to be delivered to your stakeholders (such as the funder, wider research group, etc). How will you and your staff measure these deliverables: what are the specifications, are these agreed, will they change?

What are the plans for the next phase of work? This meeting would be a chance to clarify these and for your staff to raise any issues, concerns, ideas, and solutions, they may have.

What Will I Get Out of this Meeting?
Enabling your staff to better understand future plans and direction
Working with a clear idea of the future plans and direction of the project is important; formal review meetings can help crystallise these for your staff.
Working towards a specific goal can also aid increased motivation, and will hopefully give your staff a better sense of day to day purpose/direction.

**Sense of achievement for your staff (and you!)**

It can be too easy to not take time to ascertain and celebrate what has been achieved over the last few months/year. Acknowledging your staff member(s)’ role in the meeting of agreed plans and ideas, their learning from avenues/tasks that both did and did not go to plan, and discussing new ideas and actions, will hopefully help your staff realise how much they have actually achieved.

**A chance to discuss potential or actual problematic issues before they progress further**

It can be difficult as a manager to approach and discuss any potential or actual problematic issues to do with how the work is progressing. These meetings can give you a legitimate space to raise and discuss any issues, in an environment that will hopefully be non threatening/judgemental.

There are many legitimate reasons why staff may have project related problems or issues (e.g. process/procedural issues, and lack of understanding in specific areas, a specific skills gap, etc) and they may be shy to raise these. Review meetings are a legitimate opportunity to open communication and seek solutions.

Do note, it is not good practice to ‘save up’ critical feedback over a period of time, and use review meetings as a chance to ‘spill it’ as a long list of errors, problems, etc. Giving feedback - both positive and constructively critical - as near as to the event at the time usually works best. The Appendix gives some tips on giving feedback.

**Helping your staff see the ‘bigger picture’**

This can be an opportunity to reflect: where this line of research is heading? Where does it fit in the Group / Centre / School research future? Are there future opportunities for further work/ avenues of research?

**PREPARING FOR THE MEETING**

**Logistics / Paperwork**

As a manager, you would need to access the review forms to be used, and ask your staff to be complete and return them to you in a timely fashion. You would normally also be responsible for setting a date/time for the meeting with your staff, and locating a suitable space to hold it in.

The Code of Practice for the Management of Research Staff provides template forms that can be used for review meetings. Your School/Centre may require that you let them know once review meetings have been taken place, for their records. If this is the case you should be contacted directly about this from the relevant School/Centre contact who manages these records.

**Consider Progress So Far**

Our reviewee guide asks staff to consider the following questions, and you may find it helpful to do so also, to be better able to help staff understand how the project has progressed.

- What has been achieved?
- What evidence and outputs can you show/describe?
- How has this been achieved?
- What has worked?
Future Aims / Plans / Goals for Projects

Reviewees are asked in their guide to consider if they have any suggestions or ideas in these areas. Listening to your staff ideas and suggestions, even if it is not ultimately possible to implement them, is useful. Being made to feel part of the planning process is important for staff to feel engaged and valued in their work.

If you have specific future plans that you have yet to discuss with your staff, this meeting may be a useful opportunity to raise them.

Support / Advice Your Staff May Need to Support Future Project Progress

These meetings can provide an opportunity for staff to raise questions related to specific project related work/tasks, and support or advice they may need in being able to effectively complete them.

Specific development needed by your staff, to help support project progress and outputs should also be discussed. Your staff may feel they have specific development needs/ideas related to:

- project execution (e.g. to learn specific software package, technique, etc);
- project progress/monitoring (e.g. training in project management, budgeting);
- project outputs (e.g. writing, communicating with non-academic audiences);
- any other areas not covered above.

Reviewees are asked in their guide to consider identifying options/suggestions for discussion, including how they would fit with work commitments, and what the benefits to them and to the success of the project would be. Listening to ideas and discussing what options may be possible, and/or recommending further exploration of potential options post-meeting, is important.

Staff may also be interesting in broadening their scope of skills/responsibility on a project. This would have to be discussed and agreed between you (e.g. what is realistic). If it is appropriate for your staff to expand responsibilities on the project, review meetings are a good place to discuss, and where possible, agree this.

Post-Project Considerations (if timely)

The future path of research in this area may be timely to discuss. Are there plans for continuation or expansion? Is there likelihood for further work in the area?

Remember the practicalities of writing up, dissemination, tying up and reviewing project. Is the necessary time and resources planned for? Who is doing what? Is this agreed, and do your staff understand their role?

DURING THE MEETING

Good Communication

Open communication is vital throughout a project, and project reviews are one part of this.

Good information is essential in ensuring open and useful communication. It helps you and your staff understand what is happening, pre-empt any problematic issues, and acknowledge successes along the way. We need to ask good questions to elicit good information. Both grant holders/managers and staff employed on grants need to bear this in mind. Are you asking good questions to each other?

Good questions often start with: Who..? What..? Why..? Where..? When..? How..?
Openness is key. A blame culture works for no one, managers or non-managers. If you need good information, fear of blame or retribution will hold people back from providing it. Staff and managers can feel frightened of acknowledging actual, or potentially future, project problems or issues, particularly in scenarios where they feel ‘judgement’ about them/their careers may be made. Review meetings can help potential problems from spiralling out of control, and ultimately help contribute to successful project outcomes. Try not to make review meetings about judgement. Again, good questions, on both sides, help. Such as:

- What could we do about this?
- Are there internal sources of advice/support we can speak to?
- Who else is familiar with this area/technique?
- How could we resolve this?

Good listening is also vital, on both sides. Do you clearly understand your reviewee’s responses/answers? If not, seek clarification.

**Structure**

It can be too easy to let review meetings and discussions ramble on without a structure or agreement. Remember:

- Ensure there are clear objectives for meeting, and aim to stick to them.
- Listen. As a reviewer, you should expect to be talking less than your staff member, and giving them the opportunity to talk and discuss.
- Follow the paperwork through in a timely fashion.
- Ask good questions; ask your staff member to expand on points if you’re unclear.
- Aim to agree and note objectives, plans, further areas/options to explore.

Objective setting may include necessary tasks or key work areas for the next month/6 months/year. The Appendix to this guide includes advice on setting and framing practical, workable objectives.

**FOLLOW UP FROM MEETING**

**Note of Action Form**

Your staff member(s)' Note of Action form should ideally be completed and agreed/signed as early as possible after the review meeting. Making a note of agreed follow up actions is helpful, to ensure the meeting isn’t just forgotten about. A wasted meeting is a poor use of both your time and your staff member(s)’ time. Encourage your staff to make diary reminders to check and follow up agreed notes of action (c. every 3 months).

**Agreed Action(s)? Follow them up!**

If you’ve agreed to go away and do a specific task, and/or ask questions/seek advice elsewhere, do remember to actually do so. Follow up on what you’ve done/found out. If your staff member has agreed actions to go away with (e.g. investigating development options, etc), you may need to follow up with them at a suitable point to ensure the actions are completed.

**Agree Scheduling for Next Meeting (e.g. informal progress meeting)**

Though ‘formal’ review meetings are recommended at least annually, it is likely you will meet more regularly than that. Deciding on at least a rough time for the next project meeting will be helpful.

**Over the Following Months**

It can be helpful for both you and your staff to consider the following:

- Update your objectives;
- Note progress and achievements/milestones reached;
- Keep regular notes throughout the year for future (formal and informal) project meetings;
- Raise any questions, issues, problems or concerns at the earliest opportunity. Do not wait a year until the next formal project review meeting!
APPENDIX 1: GIVING FEEDBACK

Giving productive and useful feedback during the meeting (e.g. on an aspect of their work, etc) is vital in helping your staff understand how best they can progress in future. Giving useful and impartial feedback can be quite tricky; the following points should help you feel more prepared.

- Be specific, and give concrete examples. Generalisations, or vague/indirect comments, can too easily be misunderstood or ignored.
- Be clear, accurate, and simple in your language.
- Refer to behaviour/action you have seen. It is not about your opinion on their personality, or your own feelings about them. Be fair.
- Be descriptive – what you have seen, how you react to this – and not judgemental.
- Invite them to comment or question – “Do you agree?” Encourage self-reflection, and ask for their ideas.
- Be supportive. It is not your role to be overly authoritative, or demeaning.
- Be considerate. Selfish, impulsive, or insensitive feedback is damaging. You can provide constructive criticism and still treat someone with respect.
- Provide balanced feedback if need be. Pick up both positive and less-positive aspects. Don’t however ‘bury’ criticism in amongst other things you are saying; you will only confuse the other person.

Further support: BBC Training & Development ‘Giving & Receiving Feedback’ online learning resource (free to access): http://www.bbctraining.com/onlineCourse.asp?tID=2241&cat=7
APPENDIX 2: PLANNING & OBJECTIVE SETTING: BE ‘SMART’

When discussing and agreeing plans for future work, thinking ‘SMART’ is a useful and much practiced goal setting principle used within project management and planning.

Clear objectives help you, as a manager and grant holder, to identify what is being done, by whom and when. They are a useful benchmark from which you can identify any development needs, and monitor and support your staff performance over a period of time.

When setting SMART objectives, wherever you are within the University and whatever your role, as a reviewer you will need to have as much clarity as possible about what you want or need the staff member you are reviewing to achieve. What are the research project objectives or priorities for the coming year? What do the staff member(s) you are reviewing need to achieve/accomplish in relation to these? With these needs in mind, you can then begin to apply the SMART criteria.

**Specific:** Defining what the objective/goal/task is, in concrete terms. Again, thinking in terms of the ‘Who’, ‘What’, ‘Why’, ‘Where’, ‘When’ and ‘How’ is a good starting place.

**Measurable:** What measures are you going to use to see that the objective has been met? Clarification is needed on both sides. How will you know when the objective has been achieved?

**Agreed:** Do you both understand what is being asked, and both agree to work towards it? That you are both working to the same ends is important!

(Also - ‘Achievable’ is another common term used here. You need to consider the context, abilities etc of your staff member. Is it something that they would be able to do? Would they need support (in the form of resources, training/development etc) in order to achieve the objective set?)

**Relevant:** Do plans/objectives fit with the overall project goals, and the needs of the research team/group? Is it reasonable based on their job remit/role description?

**Timed:** Have you agreed a time frame for the work? When will you expect the work to be achieved by? Will there be interim checks at specific points in time, that you will expect progress information to be available by?