CHASE cohort development fund – training and development

A guide to delivering successful training

This guide is designed to assist you in delivering your CHASE funded training programme. The funding for CHASE training events draws on different budgets and the practicalities of hosting events at different CHASE institutions and other locations will vary. The guide also sets out the expectations of CHASE in terms of the planning, delivery and outcomes of CHASE funded training programmes.

The remit of the CHASE cohort development fund (CDF)

The CDF has been funded by the AHRC to support innovative training and development activities for the cohort of CHASE-funded doctoral researchers. CDF activities should be accessible to the entire cohort of CHASE-funded doctoral researchers. In some cases, more focused subject-specific activities may be provided but these should still be open, in principle, to all eligible doctoral researchers.

Successful applications

Awards are offered subject to the following terms and conditions:

- The organiser(s) of the training activity write at least one post for the CHASE website, once the activity has taken place. The post/copy will outline the experiences of setting up and completing the activity.
- Promotional materials for the activity carry the words:
  "Supported by the CHASE AHRC Doctoral Training Partnership Cohort Development Fund".
- The organiser(s) of the activity share the evaluations of the event with the Training and Development Group.
- After the event/project has taken place, any and all unspent budget allocation reverts back to CHASE and is reinvested in future training activities.

What can be charged to the CDF?

- Honoraria for guest contributors (not currently contracted to any CHASE institutions)
- Travel, accommodation and subsistence for all contributors
- Venue hire costs (for events held at non-CHASE member institutions)
- Catering for all contributors and participants

This is not an exhaustive list so any costs that fall outside of these categories should be discussed with the CHASE Administrative Lead at your institution to ensure these costs can be met from the CDF. An up to date list of CHASE Administrative leads is here: http://www.chase.ac.uk/institutionalcontacts/

How the CDF is allocated

The budget for a training programme will be confirmed upon approval by the CHASE Training and Development Group (TDG). The budget will be allocated to each individual event as per the budget breakdown provided in the bid as approved by the TDG. The budget for each event will be devolved to the home institution of the nominated event organiser. Spending against this budget should be co-ordinated by the event organiser in liaison with the local CHASE administrative lead at their institution. The TDG will provide CHASE administrative leads with details of approved budgets for all CHASE funded events at their institution.

Alterations to the budget and / or significant alterations to the training programme must be referred back to the TDG for consideration. CHASE administrative leads will monitor expenditure and report any overspend above the agreed budget to the TDG for consideration.

Distinction between 'Programme Co-ordinator' and 'Event Organiser' in this document

Programme Co-ordinator – the individual(s) named on the CDF bid document as 'Principal Applicant'.

Event Organiser – the individual(s) identified in the bid document as leader(s) for subsidiary events within the programme.

Please note: where individual events have no named 'event organiser' it will be assumed that the 'Programme Co-ordinator(s)' will be leading these events.

These titles denote specified roles for the purposes of this toolkit. The specific titles do not need to be used in your training programme. You are welcome to assign commensurate titles to colleagues performing roles in delivering your training programme.

Additional costs

CHASE will also cover travel, subsistence and accommodation costs for CHASE funded doctoral researchers. CHASE funded doctoral researchers should use the 'CHASE application form for student support funding' hosted on the CHASE virtual research environment. CHASE funded doctoral researchers should be advised to submit claims *prior* to the event to ensure prompt reimbursement of expenses.

Non-CHASE funded doctoral researchers and participants from outside of the consortium will need to make their own arrangements to cover travel, subsistence and accommodation costs. Non-CHASE funded participants should be advised to contact their home institution to enquire about the availability of financial support for attending the training programme. These participants should be made aware that this financial support cannot be met from CHASE budgets.

Good practice for delivering successful training programmes

Logistics and practicalities

Programme Co-ordinators are advised to contact Event Organisers as soon as possible to begin the process of planning individual events. Each Event Organiser should liaise with the CHASE administrative lead at their institution. The administrative lead will be able to advise on room bookings, catering, expenses payments and similar logistics.

Programme Co-ordinators and Event Organisers are advised to book rooms, catering, accommodation and any other consumables as far in advance as possible. Liaise with the local CHASE administrative lead to expedite these requirements. Workspaces, particularly lecture theatres, are often fully booked months in advance.

Participants need to be provided details of the programme at the earliest opportunity. Participants should be notified as soon as possible to confirm if they have secured a place. Consideration should be given to 'batch vetting' of applications as they are submitted if the application deadline runs close to the commencement of the programme. In practice, students will likely need at least two weeks' notice at the very minimum to make travel and, if necessary, accommodation arrangements. They will also need to plan research activities around the training programme. Early confirmation of application success, times, dates, locations and other details will help participants plan and minimise late withdrawals and 'no shows' for the programme.

Attendance registers for each event should be returned to the CHASE team by the Event Organiser within 48 hours of the conclusion of the event – registers will be used to email an online evaluation survey to participants and to track attendance / non-attendance.

Branding guidelines

See the CHASE branding guidelines for details on how to use the CHASE logo in any promotional and training materials for your training programme.

The training programme should be framed in the context of the ethos of CHASE. This should have been established in the bid submitted to the CHASE Training and Development Group. Each event should include an opening address / welcome, ideally delivered by the Programme Co-ordinator, that confirms that the workshop / event is funded by CHASE and provides an overview of the ethos of CHASE as appropriate.

The CHASE logo should be used in any PowerPoint presentations, hand-outs and any other course materials where possible and appropriate. Group logos are available that include the logos of all CHASE member institutions. Group logos should be used in place of individual institutional logos. Contributors from organisations or institutions outside of the CHASE consortium (including CHASE external partners) should use their own institution or organisation logo as appropriate.

Making the training accessible

Programme Co-ordinators will also need to co-ordinate the dissemination of details for each event. Participants should be informed of the date, time and location for each event at the earliest opportunity. Ideally, this information should be available when participants are applying to the programme. Any reading or preparatory work required of participants prior to attending an event should be communicated to participants by the Programme Co-ordinator or Event Organiser.

Consider the geographical scope of the CHASE consortium when planning events. Many students will be travelling significant distances and may require overnight accommodation. For example, a doctoral researcher registered at University of East Anglia, living in Norwich, will spend at least five hours travelling to an event hosted at the University of Sussex.

London venues can be desirable for this reason, although training programmes should be seen as opportunities to invite students from across the consortium to visit the various campuses of CHASE institutions.

Remote participation, via skype, OU Live or a similar online platform may make the training more accessible but may only be appropriate for certain types of training.

Support for training programme leaders

Consider the administrative requirements of the training programme and the possibility of recruiting doctoral researchers / taught students or securing administrative support to perform administrative roles. In our experience, the administrative requirements of delivering training can be substantial and so recruiting administrative support is prudent.

Support roles for students should, in principle, be made available to all students across the consortium. A basic advertising and recruitment process for these roles is considered good practice. It is appreciated, however, that students registered at the institution delivering the training and known to the Programme Co-ordinator or Event Organiser will be logical candidates.

The central CHASE team will collect applications to the training programme and will send them to the Programme Co-ordinator for approval. The Programme Co-ordinator will need to co-ordinate sending out welcome / introductory information to successful applicants. The CHASE central team will co-ordinate the promotion of the programme via central CHASE communications and CHASE administrative leads at each institution. A member of the CHASE central team will endeavour to attend as many training events as possible but this is subject to availability of team members. Programme Co-ordinators will, therefore, need to co-ordinate taking registrations at each event and sending this data back to the central CHASE team.

Application process for participation in the training programme

Doctoral researchers apply to participate in your training programme using an online application form hosted on the CHASE website: www.chase.ac.uk/training-development.

There are, ostensibly, three tiers of priority for registration on CHASE funded training programmes:

- Tier 1 – CHASE funded researchers (normally given a priority window of one week).
- Tier 2 – non CHASE funded researchers registered at CHASE institutions.
- Tier 3 – other doctoral researchers registered outside of CHASE (if spaces are available the programme can be promoted via AHRC mailing lists).

Please note: where appropriate, places can be offered to staff members at CHASE partner organisations. Many staff at these organisations are doctoral level researchers (either current or completed) and will welcome the opportunity to refresh their knowledge of their subject area and keep up to date with current scholarship.

CHASE funded researchers should be given priority booking, normally a window of seven days. When the training programme is ready to be promoted the link above, along with an outline of the nature of the training, will be circulated to CHASE funded researchers. After this initial priority booking window the training programme can be promoted to all doctoral researchers at CHASE institutions. Once all doctoral researchers within CHASE have been given an opportunity to register, the programme should be promoted outside of the consortium via AHRC mailing lists. The timing of this will depend on the 'lead in' time for the programme. Please contact the central CHASE team if you wish to promote your programme via the AHRC. The participation of doctoral researchers from institutions outside of the CHASE consortium and/or students at different levels of study (such as Master's degree level or early career researcher) or based outside a HE institution is at the discretion of the training programme leader(s).

Please note: CDF funds should be used for training programmes targeted at CHASE funded doctoral researchers. The participation of other researchers is welcomed and encouraged but should not be the rationale for the programme.

This initial application process will provide you with a cohort of participants for your training programme as a whole. The Programme Co-ordinator(s) are responsible for vetting applications and confirming a list of participants for the training programme. This list should be shared with the central CHASE team for monitoring and reporting. For practical reasons some events within the programme may have limited capacity. It is suggested that an events management system, such as Eventbrite, is used to manage bookings for individual events within the training programme. Alternatively, participants can apply by email to individual event leaders. This may be more appropriate where event leaders would like additional details from participants, such as a testimonial as to why they would like to participate in the event, which is not included on the standard CHASE training and development application form.

Alternatively, the training programme can be set up as a series of individual events tied to an overarching theme. In this case the application form linked above can be used for each of the events that the programme is composed of. Promotional materials for the programme should make clear whether the programme is a series of linked events or individual events. If the programme requires participation at all events this should also be made clear in the promotional materials.

The training programme will be promoted on the CHASE website and by email to CHASE funded researchers but Programme Co-ordinators and Event Organisers are encouraged to promote the

programme to their networks of researchers and other interested parties (once the CHASE funded researcher priority booking period has elapsed).

Programme Co-ordinators should create a promotional poster and website, such as a Wordpress or University hosted site, which provides comprehensive details of the training programme. It is the responsibility of Programme Co-ordinator to ensure this website is updated and accurate.

Please note: the poster and website should display the CHASE logo. Please see the CHASE branding guidelines for further details.

Current/previous examples from CDF training programmes

Arts and Humanities in the Digital Age: https://chasedigitalage.wordpress.com/

Material Witness: http://www.materialwitness.co/

Intimacies: https://chaseintimacies.wordpress.com/

Oral History: https://clhlwroralhistory.wordpress.com/

Evaluation / Outputs

After the final event the Programme Co-ordinator(s) will be required to complete a formal evaluation of the training programme. This evaluation will reflect on the experience of delivering the training programme, indicate a commitment to run a similar programme for CHASE in future and suggest changes or improvements. The report will be considered by the Training and Development Group and will inform the decision as to whether to re-commission the training programme.

Training participants should be encouraged to write blog posts reflecting on their experience of attending training events. Blog posts from CHASE funded students can be hosted on the CHASE website: http://www.chase.ac.uk/chase-blog/. Participants should be encouraged to include examples of work produced during the event in the blog post. Files should be sent to enquiries@chase.ac.uk.

Developing online training resources

CHASE is committed to making training resources available to as many doctoral researchers as possible. Online training resources will be hosted on the CHASE website (open access) and the CHASE Virtual Research Environment (VRE) (restricted to CHASE funded students). These materials should be sent to the central CHASE team. Please email enquiries@chase.ac.uk to arrange for training materials to be hosted on the VRE.

Programme Co-ordinators and Event Organisers are responsible for determining the content of online resources. The resources should complement the training as delivered and provide a 'digital legacy' for the training that students not in attendance can benefit from. Institutional IT, TEL and A/V expertise can support the creation of this content and the CHASE team can assist with ensuring that the material developed is suitable for CHASE platforms and commensurate with resources being created from other initiatives.

Learning outcomes and the Vitae RDF Planner

CHASE uses the Vitae research development framework planner to assist researchers in tracking their professional development: https://rdfplanner.vitae.ac.uk/

All CHASE funded researchers are expected to use this tool to identify their training needs and use it to track their personal development as a researcher. Learning outcomes for the training programme and individual events should be tailored towards the Vitae researcher development framework in order to assist participants in recognising the skills they are developing by participating in the training programme.

Online resources – Huddle

CHASE uses Huddle, an online platform that hosts documents and materials to be accessible to all participants delivering CHASE activities. All named Programme Co-ordinators and Event Organisers will be given access to Huddle on approval of the training programme. If additional contributors are added to the programme or other staff require access to these materials please contact the CHASE team: enquiries@chase.ac.uk.

You must be signed in to Huddle to access these documents and materials. Please email enquiries@chase.ac.uk to request access or to report problems accessing Huddle.

The following resources are available on Huddle:

CHASE & AHRC logos and branding guidelines

Draft PowerPoint slides

Attendance register

Course evaluation form (course leader or PI)