Preparing for academic consultancy

What you need to know

Introduction

Academic careers are becoming increasingly diverse - especially for those in the early career stages. More academics now have portfolio or entrepreneurial careers and are looking to apply their expertise in these areas. Whether your career is on a 'new' or 'traditional' pathway, you'll have to demonstrate how your research has a wider impact on society and this requires opportunities to engage beyond academia.

In today's rapidly changing academic landscape, growing numbers of researchers are looking to provide consulting services and make their academic knowledge and expertise available to a variety of organisations, such as the Government, the public and third sectors.

Academic consulting also helps researchers to extend their network, keep abreast of the latest developments in their field and identify potential new funding sources. As consultancy work requires a different approach, we've created this handy guide for researchers. Here you'll find all kinds of advice and information to help you decide whether consultancy is right for you, what competencies and experience you'll need and what you need to put in place to take on this type of work.

This ebook contains interactive sections which will require Acrobat Reader to edit and save the PDF.

Portfolio Careers

Researchers who work on a number of projects for different organisations or individuals, sometimes combining these with permanent, full or part-time work.

Who is this guide for?

Anyone who is thinking of exploring new academic consultancy opportunities either through self-employment, self-employment or alongside existing. or alongside existing employment.
This guide will be of particular interest to early career academics.

Contents

Entrepreneurial Careers
Researchers sometimes take on freelance work, self-employment or run a business alongside other salaried contracts.

The current climate for early career academics

The outlook remains very positive with nearly half (44%)[1] achieving full-time positions in higher education after three years. While four out of five (79%)[2] have open-ended contracts after 7-9 years.

However, the numbers of doctoral graduates in research, teaching and lecturing roles is decreasing. The work profile of early career researchers is therefore changing as many seek out opportunities outside of academia:

41%
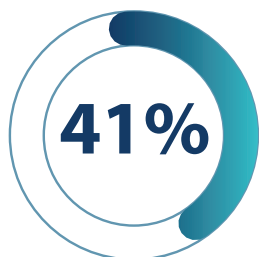
...of academics interact with the private sector[3]

44%
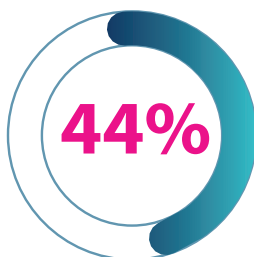
...of academics interact with the not-for-profit sector[4]

53%
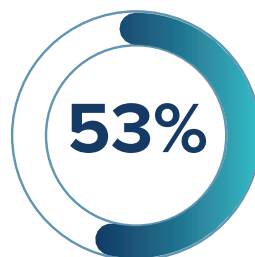
...of academics interact with the public sector[5]

Many are seeking flexible working arrangements or portfolios of activity while others are proactively considering, or already pursue, entrepreneurial careers:

• Over 50% of doctoral graduates have considered setting up their own business or going self-employed[6]

• 40% of academics at Russell Group institutions have engaged in consultancy[7]

• 13% of Russell Group academics have formed or run a consultancy company based on their research[8]

What are you doing to maximise your career opportunities in the current climate?

A growing number of researchers, especially early career researchers (ECRs) are employed on fixed-term, temporary, short-term or part-time contracts. So, it's becoming increasingly important to diversify working practices and research related activities. This can help you to raise your profile and deliver tangible impacts, new practices and better outcomes.

What is academic consultancy?

Changing work patterns are making a big impact. Consultancy opportunities are becoming an integral part of the careers of more and more researchers. So what is academic consultancy?

Academic consultancy involves an individual working in their own capacity and using their expertise in a number of ways:

• Providing expert insights

• Analysis of and opinions on research, policies and practice

• Advice and input into research design

• Measurement and analysis

• Input into experimental and prototype design

• Providing thought leadership

• Identifying evidence of emerging and future trends.

Consultancy
The provision of expert, professional and independent advice to a client on a project basis.

10 ways consultancy differs to research

1. The relationship
Academic consultants are paid for their expertise by organisations who are not funding research. So you need to get used to a relationship that is client/consultant not funder/researcher.

2. Two masters
When you work on consultancy projects you won't be employed by the commissioning organisation or your usual employer. You'll have relationships and responsibilities with both.

3. Resources
When you work on independent projects, your employer may place restrictions on what institutional resources you may use. These can include IP, insurances, licenced databases and more. You need to check what the restrictions will be (if any), including seeking the right permissions to work independently.

4. Short-term view
Consultancy projects tend to be short term in nature. But they often lead to longer-term relationships.

5. Applying expertise
Knowledge generation is not the primary purpose of consultancy. The focus is on applying existing knowledge and expertise.

6. Advisory approach
Work often focuses on providing advice which can be through conversations, as well as written documents.

7. Ever-changing
As the nature, scope and focus of engagements can change over time, this type of work can be challenging.

8. Larger network
Consultancy can bring you into contact with a wider network of individuals and organisations from different fields and sector.

9. Results
Consultancy in policy fields can be fast paced, customer focused and evidence informed. But as there's no obligation to act on your advice and recommendations, this type of work may be contrary to your outlook.

10. Negotiation
You'll need to scope and assess work up-front to negotiate payment with your clients. We recommend that you seek advice in this area.

Helps you establish your research identity and network (particularly if you're in your early career)

Keeps you up-to-date with the latest developments in your field

Enables you to expand your networks

Opens up new routes to support research impact assessments

New links with external organisations add value to the student experience

What are the benefits of academic consultancy?

You can develop a portfolio career by managing a variety of consultancy assignments alongside other contracts

You can apply your research and thinking to new contexts

Will help you identify potential pathways for future funding

You can carry out independent work as part of a new business venture

You'll enhance your overall experience and build useful data and case studies that may add value to your research

8 attributes that make a great consultant

Consultancy requires a particular mind-set. So, what attributes do you need to be good at this type of work? While our list isn't exhaustive, it's a good place to start. Score yourself out of 5 for each attribute (where 5 is excellent and 1 is where you don't have that attribute at all). If you score anywhere over 20 then this would suggest that academic consultancy could be for you.

Attribute	Excellent 5	4	3	2	Needs Work 1
1. You enjoy spending time talking and making contacts					
2. You're a good listener who builds strong relationships					
3. You're reliable, trustworthy and persistent					
4. You can forget disciplinary boundaries – your client isn't bound by them so why should you be					
5. You can leave your ego behind and accept that your input may be ignored - it's your client's prerogative					
6. You can clearly communicate what you can and can't do - your client will respect you if you say no					
7. You can focus on helping your clients solve their problems rather than furthering your research					
8. You're disciplined and will deliver what you promise					

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Scores

1 - 10:   Academic consultancy is probably not for you

10 - 20:   You may not be the right fit just yet

20 - 30:   You have the right attributes

30 - 40:   You'd be a great academic consultant.

Score 1 - 19:

You might not have the right fit to academic consultancy - so take a look at the next task to assess whether consultancy fits into your career aspirations and experience.

Score 20 - 40:

You could have the right fit to the consultant life. Use the career and experience checklist that follows to map your capabilities and find out more.

> "In past roles I often searched in vain for the expertise needed to provide the right policy advice. Having 'just in time' access to academic consultancy is essential in today's fast-moving policy climate"
>
> Niel Mclean, Director and consultant

Does academic consultancy fit into your career and experience?

If you're considering academic consultancy, you need to weigh up the positives and negatives. This section will help you find out whether academic consultancy will fit your lifestyle, personal needs and career plans.

Your motivations and objectives

Be clear on your motivations for taking on academic consultancy and what success would look like for you professionally and personally.

What is your motivation to take on consultancy? Money? Networks? Experience? What does success look like?

Consider how much consultancy you would be prepared to take on and what the scope of it might be.

How much work can you fit around your other commitments? Are there times when consultancy would not be viable? Are there sectors or types of consultancy you wouldn't want to work in?

Consider the types and extent of consultancy work you'd like to be involved with in the future.

What new challenges and experiences will develop and enhance your existing competencies?

Carrying out independent consultancy work may not always be something that you can submit as part of the Research Excellence Framework (REF) impact assessment. After all, it won't be done under the umbrella of your home institution. Speaking with your research office to work out what can and can't be counted is a useful exercise.

What work do you need to balance your CV against assessment exercises? How can you follow up on consultancy opportunities to grow these into long-lasting relationships that could lead to 'REFable' outputs?

Presenting yourself

Assess if your area of expertise is clear and likely to be in demand.

How might you develop your niche area of expertise or competitive edge?What is happening in the news? What are the hot topics or key issues in your field?"

Consider your experience of developing dynamic interactive relationships with clients.

What is your experience of managing close relationships with clients and building trust?

Consider your research identity and profile and how you promote your own competencies and knowledge to potential clients.

Have you performed a digital health check recently? What can potential clients see about you online? Does it tell them what you'd like them to know? Do you have any writing or journalism experience?

Traditional academic CVs are quite different to those needed for consultancy. Instead of listing your publications, mention your transferable skills. These can include media or media training, work in other sectors, building relationships, project management and more.

Is your CV ready for consultancy clients? Does it reflect your expertise and what they'd like to know about your ability to work on assignments?

Consider your ability to 'pitch' your competencies, knowledge and abilities to potential clients.

What opportunities can you find to pitch your research and expertise to different audiences? Can you evidence this type of experience? Is your pitch understandable and can you make the language and context clear to potential clients such as key decision makers, committees, interest groups and stakeholder audiences?

Attitude and cultural fit

We've suggested 8 attributes that make a great consultant. Consider how you measure up to these.

What are your strengths? Are there areas of consultancy that make you feel uneasy? What areas for development have you identified? What is your experience of working to tight immovable deadlines for reporting and delivery?

In consultancy you'll work with people from organisations in Government, public, third and private sectors. Evidencing your experience of working in these contexts will be helpful. Remember you'll inform action not build knowledge.

What experience do you have of working in different sectors? Have you done consultancy work before? Have you carried out evaluations or provided insights or input into decision making processes at other organisations?

Consultancy requires the right cultural and attitude match to the people and organisation you work with. While this shouldn't compromise your position, you may need to adapt or adjust your stance as you'll be part of a 'bigger picture'.

How comfortable are you adapting your style to meet the needs of your clients? Have you successfully done this? Are there any circumstances where you would not be comfortable. adapting? What is your experience of working with clients within a multi-stakeholder environment with competing constraints and points of view?

What actions have you identified in this checklist? Are there areas that you need to work on to be ready for consultancy work? Have you established any drawbacks or constraints that you may need to address? Consider how you might tackle any areas that you've identified. These 10 actions will help you get started.

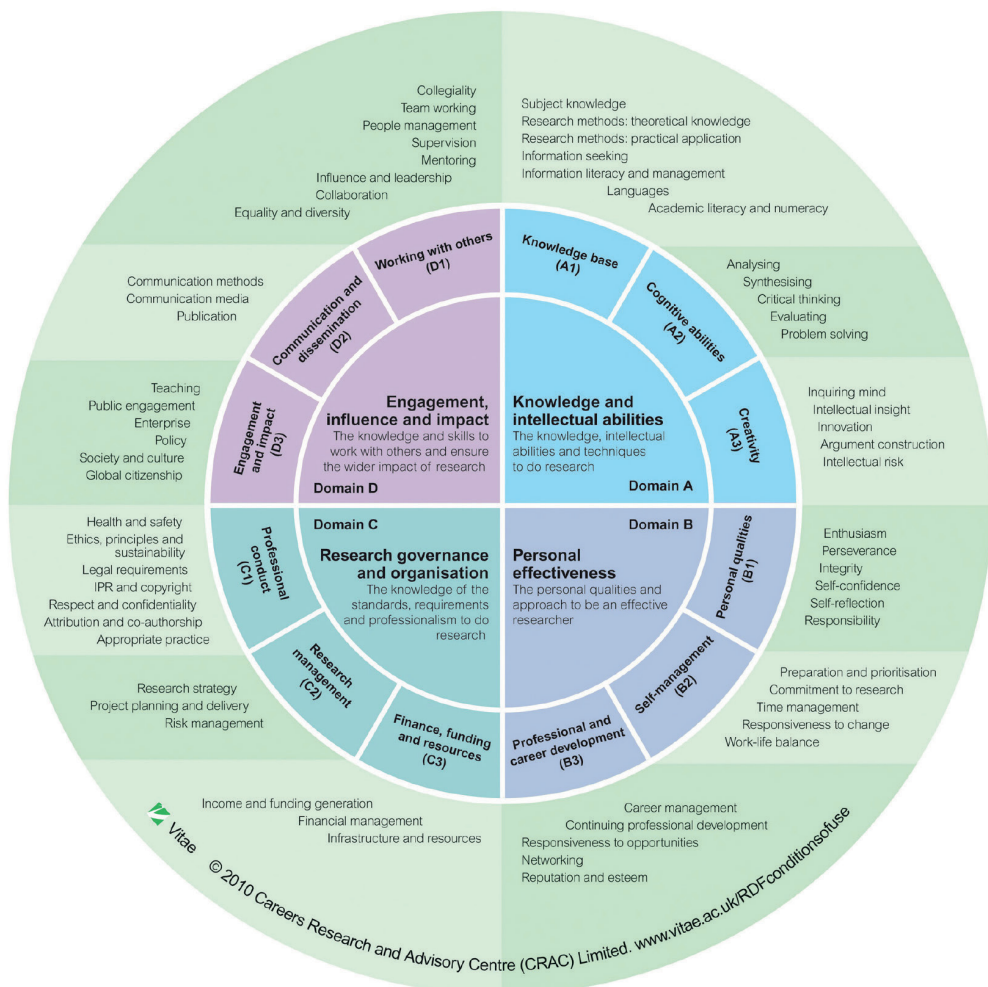# 10 actions that will help you get ready for consultancy work

You need to do a bit of legwork to get started in academic consultancy. But the career benefits and opportunities are worth the initial investment. This action plan will help you take the first steps. Please tick column when complete.

1. Scan the horizon	Regularly check out the sectors you're interested in and identify the top 5 areas that your research maps to. Use this to shape your digital identity and the positioning of your CV.	
2. Map your competencies	Consider your capabilities and expertise, identify any gaps and plan how you'll plug them. The **Vitae Researcher Development Framework** is a good place to start (see next page).	
3. Check your digital identity	Use the *jobs.ac.uk* **Digital identity health check** to assess your online identity. Then make an action plan to improve your digital footprint.	
4. Develop a consultancy CV	Access examples and advice on writing a competency based CV at **Vitae.**	
5. Develop your pitch	Develop a short pitch about your expertise based on your research and experience. Then test it out. This **article** is well worth a read.	
6. Seek out speaking opportunities	**Speakezee.org** provides excellent opportunities to bring your research to the public. Register with them to find out more.	
7. Find opportunities to write	**The Conversation UK** provides opportunities for you to write articles and bring evidence-based information to the public. Register to find out more. Your clients will have greater confidence in your abilities if you can evidence you're media savvy. Many universities and Funding Councils offer this training.	
8. Check your contractual obligations	If you're employed, there may be restrictions on what additional work you can do, how much you can do and what permissions you need. Always check with your institution or employer to see what you need to do to carry out consultancy work independently or concurrently.	
9. Set yourself up	When you carry out consultancy projects for clients, you'll need quotes, contracts and invoices. Speak to your employer if you have one – they may help you do this. Among other things, you'll need to consider contracts, fees, insurances, indemnities, tax and NI.	
10. Find consultancy opportunities	If you've followed this plan, your next step is to find an opportunity to consult on an assignment. Visit **orcid.org** to sign up for membership and get access to a whole host of helpful resources.	

"The ability to communicate ideas to an audience in a way that is accessible and engaging is a valuable skill that academics should practice. It forces one to focus on the relevance and coherence of concepts as well as evaluate the evidence to support them."

Bruce Hood, Chair of Developmental Psychology in Society, University of Bristol and Founder of Speakezee.org

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Vitae Researcher Development Framework

Vitae Researcher Development Framework

Collegiality
Team working
People management
Supervision
Mentoring
Influence and leadership
Collaboration
Equality and diversity

Subject knowledge
Research methods: theoretical knowledge
Research methods: practical application
Information seeking
Information literacy and management
Languages
Academic literacy and numeracy

Communication methods
Communication media
Publication

Analysing
Synthesising
Critical thinking
Evaluating
Problem solving

Teaching
Public engagement
Enterprise
Policy
Society and culture
Global citizenship

Inquiring mind
Intellectual insight
Innovation
Argument construction
Intellectual risk

Health and safety
Ethics, principles and sustainability
Legal requirements
IPR and copyright
Respect and confidentiality
Attribution and co-authorship
Appropriate practice

Enthusiasm
Perseverance
Integrity
Self-confidence
Self-reflection
Responsibility

Research strategy
Project planning and delivery
Risk management

Preparation and prioritisation
Commitment to research
Time management
Responsiveness to change
Work-life balance

Income and funding generation
Financial management
Infrastructure and resources

Career management
Continuing professional development
Responsiveness to opportunities
Networking
Reputation and esteem

Working with others (D1)
Knowledge base (A1)
Cognitive abilities (A2)
Communication and dissemination (D2)
Creativity (A3)
Engagement and impact (D3)
Professional conduct (C1)
Personal qualities (B1)
Research management (C2)
Self-management (B2)
Finance, funding and resources (C3)
Professional and career development (B3)

Engagement, influence and impact
The knowledge and skills to work with others and ensure the wider impact of research
Domain D

Knowledge and intellectual abilities
The knowledge, intellectual abilities and techniques to do research
Domain A

Domain C
Research governance and organisation
The knowledge of the standards, requirements and professionalism to do research

Domain B
Personal effectiveness
The personal qualities and approach to be an effective researcher

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Further reading

How to Develop a Portfolio Career in Academia

Is a Portfolio Working for You?

Should I do a PhD?

Non-Academia Career Options After your PhD

Sources

[1]https://www.vitae.ac.uk/vitae-publications/reports/what-do-researchers-do-early-career-progression-2013.pdf
This is only available to Vitae members - www.vitae.ac.uk/membership

[2]http://www.rcuk.ac.uk/RCUK-prod/assets/documents/skills/timodcfullreport.pdf

[3]UK Innovation Research Centre, Knowledge exchange between academics and the business, public and third sectors, 2009

[4]UK Innovation Research Centre, Knowledge exchange between academics and the business, public and third sectors, 2009

[5]UK Innovation Research Centre, Knowledge exchange between academics and the business, public and third sectors, 2009

[6]https://www.vitae.ac.uk/vitae-publications/reports/what-do-researchers-do-early-career-progression-2013.pdf
This is only available to Vitae members - www.vitae.ac.uk/membership

[7]http://www.russellgroup.ac.uk/uploads/RG_ImpactOfResearch2.pdf

[8]http://www.russellgroup.ac.uk/uploads/RG_ImpactOfResearch2.pdf

About the authors

Niel Mclean
Niel has over 20 years' experience of working within Government agencies in the education sector. He has commissioned and led research in the public and private sectors. Niel has also advised on policy, including developing evidence-based bids to treasury, shaping strategies and leading multi-million-pound Government programmes.

Tim Rudd
An independent researcher, Tim has a wealth of experience when it comes to designing and delivering national and international research projects. A founder of Livelab [www.livelab.org.uk], a research and development organisation, he also works for the University of Brighton. Tim's research specialisms include educational theory and educational technologies.

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