



ARMA

20 years on

From **RAGnet** to
ARMA 2001 to
2011: the evolution
from a 'self help'
support group
into a professional
association

Introduction

The history of the Association of Research Managers and Administrators (ARMA) from 2001 to 2011 is a 'coming of age' story. It picks up from the history of the first ten years that recorded the formation of DORCISS RAG and its evolution to **RAGnet**. The second ten years chart the growth and development of the organisation from a self-help group to a recognised professional association representing an influential and burgeoning element of the UK's research community.

During this period **RAGnet** underwent a name change and became ARMA; it changed its legal status to become a company limited by guarantee; its three Chairs all played distinct roles in moving forward the organisation, and its membership grew by nearly 400 percent from 350 in 2001 to more than 1,700¹ in 2011.

This history is an attempt to supplement the existing documentation such as the annual reports, meeting minutes and newsletters that already record the events of the last decade, with an account of the drivers behind the key events, explaining why they happened as they did. The 2001 to 2011 history is presented in three parts that loosely correlate with the tenure of each Chair.

The Individuals

The history of **RAGnet**/ARMA is ultimately a history of dedicated individuals, so to assist the telling of the story it is beneficial to briefly introduce some of the key Committee Members and Directors in the 2001 to 2011 period.

- Jacqui Forsyth, Chair 2001 to 2004
- Peter Townsend, Chair 2004 to 2006
- Ian Carter, Chair 2006 to present
- Steff Hazlehurst, member since 1996, currently Treasurer, previous posts include Deputy Chair Membership Services, conference organiser and creator of the **RAGnet** website and members database from 1998 to 2008
- Pauline Muya, member since 1995, currently Deputy Chair Training, has held a number of positions on the Committee and helped to create the popular induction course
- Rosemary Hatch, first dedicated Executive Administrator appointed in 2005, previously a Committee Member
- Nigel Billsbrough, member since 1994, Secretary from 2000 to 2006
- Simon Kerridge, member since 1997, Secretary from 2006 to present
- Phil Clare, Deputy Chair from 2001 to 2004 and currently Chair of PraxisUnico

¹ As of March 2011



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- Rossana Dowsett, member since 2000, Acting Treasurer and Treasurer 2002 to 2006
 - Ray Kent, member since 2001, editor of IRMA occasional paper series 2004 to 2011
 - Kate Nimmo, member since 1994 and Treasurer from 1997 until 2002

ARMA's Board at the time of writing consists of: Ian Carter, Chair; Pauline Muya, Deputy Chair and Director of Training; Steff Hazlehurst, Treasurer; Simon Kerridge, Secretary; Lita Denny, Director of Conference; Sheena Bateman, Director; Ray Kent Director; Tony Weir, Deputy Chair, Membership Services; Louise Shelley, Director.



Part 1: Growing Pains 2001 to 2004

2001 to 2003: Foundations for change

The focal point of the year for ARMA members is the Spring gathering. This is the Association's most high profile networking event. It is an opportunity for members to get together to share and discuss the most pressing issues in research administration with their peers from the UK and around the world and with a range of speakers from the funding councils, Research Councils and government. It is also a great opportunity to socialise.

The 11th Annual Spring Workshop was held in May 2001 in Newcastle-upon-Tyne and included a number of supplementary events: the gala dinner, the AGM, Advisory Group meeting and pre conference training sessions. The conference was entitled 'People Power'. It explored the different stakeholders in the research process and their roles. More than 90 delegates attended and it was designed to offer *'participants an opportunity to relax after the RAE and before the aftermath and still gain some useful insight into how they could move forward in research administration.'*ⁱ

At the **RAGnet** AGM on 24 May 2001, Jacqui Forsyth, then Head of Research and Enterprise Services at the University of Kent, was officially appointed as Chair, having been Acting Chair since taking over from Charlotte Wellington in 2000. Her appointment was to mark the start of great change for **RAGnet**. At the same meeting Phil Clare was appointed as her deputy. Another notable appointment at that meeting was Rosemary Hatch who, five years later, would go on to play a pivotal role in establishing the organisation's professional status.

Growth and sustainability

RAGnet's membership at the time of AGM in 2001 stood at more than 350 members, representing 93 different HE institutions and 20 other organisations. Membership had grown exponentially between 1998 and 2000. A discussion paper presented to the Committee by Steff Hazlehurst in June 2001ⁱⁱ, suggests approaches to increase and widen recruitment, for example, hiring a student to research university websites to identify relevant potential new members, and pursuing new members at the Research Councils. The paper also raises concerns about retention of new members:

*'In order to retain members, we need to meet their needs. We can imagine that this means making sure that our events are relevant to all sections of the membership and organising specialist events from time to time; and ensuring that RAG Times addresses all sections of the membership (A Day in the Life of a Science Faculty Administrator?).'*ⁱⁱⁱ

This extract highlights three perennial concerns of the **RAGnet** Committee: the sustainability of an organisation managed entirely by volunteers, the need to expand the membership within and beyond higher education to create a solid financial base, and to ensure that the events and training meet the needs of all members.

The growth of the organisation in recent years, and the lack of administrative infrastructure to support the Committee Members, meant that there was an increasing sense that it was all becoming *'intolerable'*^{iv} for the willing but increasingly overburdened volunteers. During 2000 the first steps were taken to put administrative support in place with the appointment of two part-time administrators paid for by membership fees. They were Ann Hill at the University of Kent, who worked with Jacqui Forsyth, and Sharon Lawson at the Institute of Education, who worked with Steff Hazlehurst. Though this eased some of the burden, it was not



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enough resource and the question of whether or not to recruit dedicated support staff was an ongoing discussion.

Soul searching

This period in **RAGnet**'s history is described by Peter Townsend (Chair 2004 to 2006), as a period of “*soul-searching*”. It began in the late 1990s and came to head under Jacqui Forsyth's tenure as Chair. Kate Nimmo, Treasurer from 1997 to 2002 and one of the founding members of the original DORCISS RAG that evolved into **RAGnet** and then ARMA, said of Jacqui “*she had a vision and was a real instigator in getting things pushed through*”.

There were a number of different drivers that came together in 2001 to 2004 to spawn many debates within the Committee around the question ‘What is **RAGnet** for? Who does it serve? And where is it going?’ There were concerns around the growth in membership and the ability of the committee of volunteers to maintain what was “*effectively a second job*”^v. Combined with the question of sustainability was the fact that more administrators and managers from central research offices at universities were joining **RAGnet**. In 2002 membership had increased again to more than 400 individual members and 60 percent of them were based in central offices^{vi}. They had a tendency to be more senior people and therefore had slightly different needs and a different perspective on the wider political landscape than administrators within research centres or schools who traditionally made up **RAGnet**'s core membership.

Jacqui Forsyth admits that, “*in some ways what I did as Chair in terms of the direction of the organisation reflected my own personal experience as well as what was going on more widely*.”^{vii} Jacqui had joined **RAGnet** in 1995 and at that time was an administrator based at small department at the University of Lancaster. She then moved to a central research office at the University of Kent and quickly progressed to Head of Research and Enterprise. She was able to see from a very personal perspective how research administration as a career was developing and taking on a more influential role within the HE sector. To stay relevant and to maintain its value to its members **RAGnet** had to reflect these changes.

“*The big things I tried to do were to bring in the whole range of research administrators, people from central research management which also brought in more senior people. And the other driver was trying to professionalise. There was never any doubt about the high quality of what we were doing but we did not always present ourselves as professionally as we should,*” commented Jacqui.

This pre-occupation with professionalism, of both the organisation and the job itself, is a recurring theme over the decade. The 2002 AGM held in Leicester during the 12th Spring Conference proposed and passed several constitutional amendments ‘*to more accurately reflect the current reality and to aid the increasing professionalisation of the organisation*’. It was proposed to redefine eligibility for membership to include members not working in universities or research institutions; to change elections to postal ballots as the growth in the membership meant that the percentage of members attending the AGM no longer represented a majority; and to create an additional Deputy Chair post within the Committee.

At this AGM Steff Hazlehurst was appointed Deputy Chair alongside Phil Clare. Kate Nimmo stepped down as Treasurer after five years on the Committee and Rossana Dowsett, a research administrator from the University of Sussex took up the post of Acting Treasurer. Rossana describes the post as “*a bit of a poisoned chalice*”^{viii}, due to the amount of book keeping involved and lack of administrative support.



Bluebell Report

The question of how **RAGnet** might develop to a professional organisation and achieve a step change was discussed with **RAGnet**'s Advisory Group which was set up under Charlotte Wellington's Chair to act as a sounding board for the Committee. It was made up of senior figures from across the research sector and included John Wand MBE from the Engineering and Physical Sciences Research Council (EPSRC), Alison Douglas Director of UKRO, Diana Garnham, Chief Executive of the Association of Medical Research Charities, and Richard Tomlin of Bluebell Research.

The Advisory Group recommended that **RAGnet** should consider taking on a permanent member of staff to support the Committee, operating at a more senior level than the current part-time executive assistants. Though this course of action was agreed by the Committee, it was clear that this had significant implications for future funding of **RAGnet**. An extract from a briefing paper that year says: *'... considerable work is needed to take this forward, and ... we need to be very clear about our mission and activities and future direction.'*^{ix}

In August 2002 the Executive Committee organised an overnight away day (14-15 August) at London House to provide *'the time and space'*^x to further explore these implications including developing a business plan to increase the membership base, adding to the portfolio of training and creating a job description for an Executive Officer.

The result of the away day was a realisation that *'the financial assumptions underpinning these ideas were somewhat vague and had not been tested'*^{xi}. It was decided that some research was required to obtain robust data on which to base decisions and to provide a strategic context for development of the organisation. With the help of John Wand, EPSRC was approached and agreed to part finance the project. After a tender exercise Bluebell Research, headed by Richard Tomlin, was commissioned in October 2002 to explore the salient issues.

When it was delivered in April 2003, the Bluebell Report set out the roadmap for **RAGnet**'s future direction. It identified the three things that the members valued the most were the sense of community that **RAGnet** engendered, the quality of the training that was offered and the mailing lists (though this was disliked and loved in equal measure).

As part of the fieldwork for the report a third of the membership, about 150 people, took part in an on-line survey. This was followed up with focus group meetings held in London including both ordinary members and Executive Committee Members. There was also a competitor analysis and a scope enquiry that involved interviews with potential new members and partners.

The report included 10 recommendations for the Executive Committee that covered expanding membership in pre-1992 universities as well as within charities, NHS and Research Councils. It considered the potential pitfalls in expansion and the danger of losing the 'sense of community'. It also looked at opportunities and dangers of partnering with another organisation, the scope for advocacy as part of **RAGnet**'s remit, the need for a name change and the question of an office and what its role might be.

The report was discussed at the 2003 AGM during the 13th Spring Conference in Bristol. The members present were asked for its views on any of the points raised by the report. There was general agreement that developing training was



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an appropriate activity. A question was raised about obtaining formal qualifications and whether **RAGnet** should be moving towards a certified qualification in research administration. The response from the Committee was that this had been *‘explored in the past but was perceived to be such a huge undertaking it had not been pursued.’^{xii}*

This was an interesting point. The theme of the conference that year was the management and governance of research. There were a number of legislative changes that had come about or were underway i.e. the Roberts Review and Full Economic Costing, which would increase the external governance of research and therefore the complexity of research administration and management. The question about accreditation offered an insight into how the external environment was pushing some within the research management community to consider more formal recognition of their skills. This issue of whether or not ARMA should pursue certified status for its training is not resolved and remains an ongoing discussion that generates divergent views.

Collaborative training

It is clear from the subsequent decisions and actions taken by the Committee that the findings of the Bluebell Report were extremely influential in providing a framework for a step change. However, a review of the schedule of training sessions provided during 2002/3 indicates that **RAGnet** was already proactively tackling some of the issues raised in the report. In particular, it was seeking out and exploiting new collaborations to help it increase the diversity of training to serve the full breadth of its membership.

RAGnet was building its relationship with the EPSRC, forged with the help of John Wand on the Advisory Group. The first Research Council study tour with EPSRC was organised for March 2002. It was run on a trial basis for just ten participants and was a huge success. It set the template for what would become one of **RAGnet**'s most popular member benefits and has helped **RAGnet**/ARMA establish relationships with a number of different funding bodies.

In addition, during 2002 **RAGnet** organised two joint training seminars. The first was with the British Academy and brought together a range of funders from the social science and humanities to present funding opportunities in these areas. The other was an event held with the Association of Medical Research Charities (AMRC) discussing dissemination of research findings from the different perspectives of the AMRC, a medical charity, health journalism and a university press officer. This event in particular shows how **RAGnet** was already broadening its training topics to meet the needs of a niche part of its membership.

International relations

The early 2000s was not entirely characterised by introspection. **RAGnet** stayed true to its roots and continued to establish and strengthen international links with its sister organisations around the world. It already had links with the SRA in America and was the inspiration behind the setting up of the European Association of Research Managers and Administrators (EARMA) in 1992. During 2001 to 2003 **RAGnet** members helped to expand the organisation's international collaborations.

During 2002 Richard Tomlin, Advisory Group member, organised a study tour to the USA (following the success of a previous tour in 1998) which Simon Kerridge and Jacqui Forsyth attended. It was recognised that America was ahead of the UK in



consideration of issues such as research governance and ethics, and the tour was an opportunity to better understand these issues and how they might develop in the UK.

In 2001 Peter Townsend attended the SRA conference in Vancouver, where the creation of the International Network of Research Management Societies (INORMS) was agreed. **RAGnet**'s involvement with INORMS was endorsed by the Committee in 2002 and later that year Peter attended the inaugural INORMS meeting in Orlando. The association with INORMS would prove to be very beneficial in raising ARMA's international profile. However, John Kirkland, Deputy Director of the Association of Commonwealth Universities (ACU), which is also part of INORMS, believes that initially **RAGnet**'s participation in INORMS was, in part, motivated by a desire to provide a balance to the influence of the SRA. He says: *"It [ARMA] has been one of the core attenders with the SRA and Australasian Research Management Society (ARMS). I think that part of ARMA's objective in being part of INORMS was to ensure that the SRA would not assume a dominant role in world research administration. This has been a success for ARMA."*^{xiii}

The Association's willingness to share knowledge and best practice beyond its own national borders is evident in its ongoing collaboration with the ACU and involvement with the Southern African Research and Innovation Management Association (SARIMA) and the West African Research and Innovation Management Association (WARIMA). In February 2003 **RAGnet** delivered a one-day seminar for 28 ACU-sponsored postgraduate and postdoctoral researchers from 13 different Commonwealth countries. This was the first seminar of its kind and involved among others, Phil Clare, Simon Kerridge, Peter Townsend, Steff Hazlehurst and Jacqui Forsyth. The seminar was entitled 'Obtaining and Managing External Research Income' and Phil recalls Jacqui being asked a perfectly serious question from one attendee about "where to include bribes when costing up research?" He cannot recall her response but this highlighted the challenges of translating research management into a completely different cultural framework. He says, "The experience of working with others who are in the process of forming their own research management sector challenged our own ideas about what is "normal" or "expected" in our own academic culture."^{xiv}

2003 to 2004: Deliberation, debate and decision making

The 12 months from May 2003 to May 2004 is an eventful period in the history of **RAGnet**/ARMA. Membership passed the 500 milestone and now included universities in the Republic of Ireland, Denmark and the Netherlands; the **RAGTimes** newsletter, edited for many years by Kerry Wilding, was discontinued after 17 editions and was replaced with a new electronic newsletter. Accompanying the newsletter was a new occasional paper series entitled 'Issues in Research Management and Administration' (IRMA). Also, the last Spring Workshop was held in York in 2004. It is renamed the Spring Conference in 2005 which reflects the Association's growing self assurance.

The keynote speaker at this last Spring Workshop entitled 'Collaboration, Competition and Concentration' was Dr Ian Gibson, who was then Chair of the House of Commons Select Committee on Science and Technology. Simon Kerridge was instrumental in securing Dr Gibson's appearance. He recalls: *"As Chair of the House of Commons' Science and Technology Select Committee, Dr Gibson was very influential in the world of research. The significance of this was what it indicated about our direction of travel as an organisation: for someone at that level to believe that it was worth taking the time to headline a **RAGnet** event showed how far we had come"*.^{xv}



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This was a period of intense development for **RAGnet**. Two sub-committees were set up for training and communications. Phil Clare headed up the communications sub-committee and Steff Hazlehurst, as Deputy Chair Training, headed up the training sub-committee. A number of changes were instigated to *‘further professionalise [RAGnet’s] activities’*^{xvi}. These included devolving responsibility for co-ordinating different types of activities to different members of the committee and recognising two types of one-day seminars. There would now be expert seminars defined as *‘a one day event on a topical and generally one-off subjects’*^{xvii}, co-ordinated by Rosemary Hatch. The sub-committee also decided to develop a series of training seminars to run over a three yearly cycle, building on the universal research administration topics covered in the induction workshop.

For the Executive Committee the year was characterised by much debating around the questions and recommendations that stemmed from the Bluebell Report. Phil Clare recalls *“there was lots of fairly intense debating about where we were going and what we were trying to achieve”*^{xviii}. However, it was the name of the Association that promoted the most heated debate. There were very strong opinions over the inclusion of the words ‘managers’ and ‘administrators’ and whether the name should feature one or the other or both. At the centre of this debate was a battle for the organisation’s future direction: who was it there to serve?

Ian Carter, then Director of Research Development at Glasgow University, had recently joined the Committee after, as he puts it, *“being persuaded by Steff, Phil and Pauline [Muya]”*^{xix}. His involvement in **RAGnet** was a coup for the organisation as he was, and remains, a very influential and well respected figure in the research management community in the UK and internationally. He argued strongly for the inclusion of ‘manager’ in the title as he saw it as essential to move the organisation away from its reputation of being a network for junior staff - an opinion he freely admits he himself held before attending the 2003 Spring Workshop in Bristol. Kate Nimmo, who had stepped down as Treasurer but continued on the Committee, says of that period:

“There were some fairly strong views. Some of us were determined to get the administrators element retained in the title because at one point I seem to remember it was going to be the Association of Research Managers. There was a lot of discussion from both points of view. That reflected the external issues about where the organisation was going and difference between central research and people in departments or research institutes”.

This is a point that Nigel Bilsbrough, Secretary from 2000 to 2006 and one of the original members of DORCISS RAG, also highlights. He recognises that as one of the “old guard”, i.e. an administrator based in a research centre rather than in a central university research office, he is now a rarity and that *“as a proportion of the membership the influence of people [like me] has much declined”*^{xx}. Nonetheless, Nigel points out there is no other organisation that serves the needs of research administrators, and ARMA has provided invaluable support during his 20 years of membership.

In the end, the proposed name, the Association of Research Managers and Administrators was put to the AGM in York on 13 May 2004 and was carried unanimously.

Jacqui Forsyth had come to the end of her term and this was her last AGM as Chair. **RAGnet** had reached a tipping point in 2002/3 and Jacqui had the drive and clarity of vision to acknowledge that changes had to be made. She helped to put in place groundwork to take **RAGnet** forward to the next stage of its development.



The AGM minutes state:

*'The meeting wished to record their appreciation, on behalf of all **RAGnet** members, for the tremendous job Jacqui had done as Chair, and for her vision and commitment in steering the organisation forward at a time of great challenge and change. Her contribution was much appreciated and her presence will be greatly missed.'*^{xxi}

There were other changes on the Committee this year: Rossana Dowsett was officially appointed Treasurer after being Acting Treasurer since Kate Nimmo stepped down in 2003; Lee-Ann Coleman, then Deputy Director of the Association of Medical Research Charities and Gareth MacDonald from BBSRC were both appointed to the Committee as special advisors *'to ensure that the interests of Research Council and medical charities staff...are adequately represented in event and training planning'*^{xxii}.



Part 2: Becoming ARMA 2004 to 2006

Neither of the Deputy Chairs, Phil Clare or Steff Hazlehurst, put themselves forward for election, so Jacqui Forsyth was succeeded by Peter Townsend. Peter was at that time Head of the Research Office at Loughborough University, and had been a member of **RAGnet** since 1997 and Committee Member since 1999. His role on the Committee until that point had included supporting and organising various training events having had responsibility for the Leicester annual conference. In 2001, when he attended the Vancouver meeting, he initiated links between **RAGnet** and the SRA in North America and was the person responsible for **RAGnet**'s involvement with INORMS. As Chair, Peter continued to implement the changes that had been set in train by Jacqui.

A new name and a brand

Work on the re-brand started straight after the 2004 AGM. Steff Hazlehurst took the lead on project managing the re-brand. After a tender exercise, a Bournemouth-based company called Campbell-Rowley were appointed to create the design concept, and Keymedia based in Brighton to design the website templates and pages. The ARMA brand was fresh and bright and modern and was officially launched across all of ARMA's print and on-line material in January 2005. There was a lot of work and money involved in achieving this. Steff recalls that she *"spent every day that Christmas, except Christmas Day, working on the re-brand, re-writing and re-coding pages on to the new web formats."*^{xxiii} The rebranding exercise cost £41,000, but everyone was pleased with the results and believed that it represented 'excellent value for money'.²

The re-brand was a success and is an important milestone in the organisation's development into a professional association. Phil Clare describes the process and its impact:

"I was very sceptical about the value of creating a new brand at the start but came out convinced of the value of it. It marked a significant step change in how we talked about ourselves, from support group to advocate - a professional organisation operating at high level to support members and with international links. The re-brand signalled to the world that we had an answer to the question of 'what is ARMA for?'"^{xxiv}

The re-brand was supported by a substantial marketing effort. Branded pen holders and leaf-motif folders were dispatched to all members in padded silver envelopes by Steff and Sharon Lawson. There were also articles in *Research Fortnight* and *Times Higher*, but by far the most effective marketing tools were the new look website and the introduction of a new group membership category.

Group membership was designed to appeal to managers and people with responsibility for staff. It allowed for discounted group rates for eight or more people based at the same organisation, but maintained the benefit of having named individual members as part of that group.

Simon Kerridge, who was responsible for membership from 2001 to 2006, explains the impact of the re-brand, *"It was a great opportunity to reach out to potential new members and in turn it gave them the impetus to find out more about this 'new' organisation called ARMA."*^{xxv} At the end of March 2005, three months after the re-brand, membership had increased by an unprecedented 40 percent from the previous year. There were now 743 members, up from 536, representing 186 different institutions. Group membership accounted for 'significant growth'^{xxvi}, and by 2011, groups account for 65% of members, with the two largest groups (Cambridge and Glasgow) having more than 50 members.

² An email from Steff Hazlehurst to the Committee dated 10/1/05 says: "No rest for the wicked... By the way, I reckon that in the last six weeks, I have probably put in 200 direct hours on the website. That's obviously a very rough estimate - but if anyone asks at the AGM, I thought it was worth having an idea..."



The new website was also playing its role in increasing membership by attracting many more visitors. The 2004/5 annual report records:

'Feedback from members has been very positive, and the impact of the redesign on the use of the website has been particularly marked: visitors now visit twice as many pages, for twice as long, as on the old site, due to the greatly improved navigation. Since January, a significantly increased number of people have joined ARMA via the website than in the same period in earlier years.'

Single point of failure

The new website was developed by Steff Hazlehurst who had created and taken care of **RAGnet**'s online presence virtually single-handed since joining in 1998, with a little help from Simon Kerridge, a computer scientist by training. In 1999 Steff created an online booking system on the website that generated an invoice. At the time this was cutting edge technology. Over the years the website had been updated and patched up by Steff and the software was now outdated and increasingly in need of an upgrade.

Since the early 2000s the organisation's dependence on Steff's knowledge and skills in relation to the website and booking system was recognised as a critical point of vulnerability and a constant source of concern to her and the Committee. In a paper presented to the Committee during 2004^{xxvii}, Steff outlines these concerns in particular the need for the database to be updated and for professional support to be put in place. Despite the website's new front end it would be another three years before the infrastructure was updated, and this vulnerability properly addressed, by hiring an external company to host and maintain the website and database.

Revitalising training and communication

Whilst the name change and re-brand were consuming additional time, effort and energy, **RAGnet**'s ongoing schedule of training and external relationship building continued.

The training sub-committee was in its first full year of operation and the focus was on implementing the changes agreed in the previous year on the presentation of events and establishing new discussion groups. Four expert seminars were held including one on preparing for the RAE 2008 and there was the inaugural meeting of the Ethics and Research Governance discussion group, developed as a response to requirements from the Research Councils and other funders. The study tour programme was expanded to include visits to the Medical Research Council (MRC) and the Biotechnology and Biological Sciences Research Council (BBSRC), as well as EPSRC.

In June 2004 the occasional paper series, Issues in Research Management and Administration (IRMA), was launched. The first edition was called '*Sustainability and Full Economic Costing: Policy and Implications*'. It was edited by Phil Clare and included contributions from John Wand, Ian Carter and John Newton, at the time National Co-ordinator of the Joint Costing and Price Steering Group. It was followed by '*Great Expectations: Managing and Developing Contract Research Staff*' at the end of March 2005, this time edited by Ray Kent. Ray has ensured that over the years the papers remain topical and challenging. The IRMA series is yet another indicator of ARMA's maturity and growing confidence. It is distributed in the UK and internationally and has been very well received, making a positive impression outside of the membership.



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International networks

Like many on the Executive Committee Peter Townsend had a particular interest in fostering international relationships; now with Ian Carter on the Committee - who himself had a strong international profile and had been attending SRA conferences in the US since the late 1990s - this strand of activity took on more pronounced strategic role. The increasing international collaborations between researchers meant that **RAGnet**/ARMA’s links with sister organisations around the world had, and continues to have, a strategic as well as practical impetus for its members.

In 2004, **RAGnet** representatives attended four international conferences: Southern African Research and Innovation Management Association (SARIMA) in Cape Town in May (2004); the European Association of Research Managers and Administrators (EARMA) in Bucharest in June (2004); the Australasian Research Management Society (ARMS) in Fremantle in September (2004); and SRA International in Salt Lake City, Utah, in October (2004).

The organisation continued to increase its influence in INORMS. Minutes from a **RAGnet** Committee meeting in November 2004 reporting on Ian Carter’s attendance at the ARMS conference states that: *‘significant progress has been made in INORMS which is becoming much more international but with the balance of power moving away from the US towards UK/Australia’*.

UK networks

RAGnet was also busy nurturing relationships here in the UK with organisations such as Association of University Research and Industry Links (AURIL), UNICO, the Association of Research Centres in Social Sciences (ARCISS) and Praxis. Due to these associations all operating in related but distinct niches within UK research, these relationships tend to be more complex and, at times, more political than relationships with international sister organisations. These organisations were both potential partners and competitors. This dichotomy is illustrated by minutes from a Committee meeting in late 2003 that recorded a discussion about AURIL, which at the time was considering its future direction. The minutes state: *‘We [RAGnet] need to decide if we want to engage in process by working with them to shape the future or continue to see them as a threat... Also it is hard to see the links between knowledge transfer and research administration in Universities. However, it is difficult to see how **RAGnet** can continue to grow if it doesn’t join in the process.’*^{xxviii}

ARMA did continue to grow, but it is clear that adeptly managing these complex relationships and forging constructive links with other associations is important to ARMA’s success. In October 2005, the now re-named ARMA and Praxis (before its merger with Unico) delivered their first three-day residential training seminar in Bournemouth on research contracts. The course aimed to encourage interaction between technology transfer professionals and ARMA members, with participants bringing new perspectives to each other’s work. This collaborative relationship with PraxisUnico has continued, due in part to ARMA’s former Deputy Chair, Phil Clare, who is now Chair of PraxisUnico and still retains his ARMA membership.

An office and change of status

During 2004 the Executive Committee finally took the decision to set up a dedicated administrative office with paid support. The need for an employee to support the work of the Committee had been a discussion item at numerous meetings for many years. The 2004 Strategic Plan includes an objective to achieve a definitive



conclusion about this by 2007^{xxx}. But the momentum created by the name change, combined with the desire to ease the pressure on Committee Members, expedited this decision. Additionally, the continued increase in membership aided by the introduction of group membership in 2004/5 made it financially viable.

In October 2005, Rosemary Hatch was appointed to the post of Executive Administrator. A paper in early 2005^{xxx} shows that originally Steff Hazlehurst had considered taking up the position herself. Steff says: *"At that point I wanted out of London and the plan was to set up the office at Liverpool University. But during April I was offered a job [at the Institute of Education] that I couldn't refuse"*.^{xxxi} No-one applied first time around but after the role was revised and re-advertised later in the year, Rosemary was appointed. Rosemary is credited by members for helping to increase the professionalism of the organisation and thus helping to maintain the healthy upward curve of the membership numbers: Maggy Taylor, a member of the conference sub-committee describes her as a *"wonderful administrator"*.^{xxxi}

Rosemary wanted to work from home, so ARMA's administrative base was set up in Exeter, first in Rosemary's home study and later, once Jenny Stevens had joined to help with financial administration, in a small Regus office in Exeter.

Following Rosemary's appointment the next major milestone for the Association was the change of legal status in May 2006. Rossana Dowsett, Treasurer at the time, played an important role in bringing about the transfer of status, she says: *"As the membership grew and grew the amount of money that it was turning over increased. It was a big responsibility and we [the Committee] felt that we needed to create a legal entity for the Association. I volunteered to look into this."*^{xxxi}

In the late 1990s there had been discussions about the possibility of becoming a charity. With the help of Deborah Froud, a Committee Member from Bournemouth University with a legal background, Rossana presented a paper to the Committee in November 2005 laying out the options for becoming a charity or a company limited by guarantee.

At a special general meeting held on 25 May at the Edinburgh conference - which was effectively a lock-in at the end of the plenary session to ensure that sufficient members would be there to guarantee quorum - ARMA's members supported unanimously a motion to dissolve the current unincorporated association and to transfer its assets to a company limited by guarantee (CLG)³. ARMA was incorporated on 31 May 2006.⁴

For some members it is this change of legal status, rather than at the point of the name change, that ARMA metamorphosed from a 'self-help group' to a professional organisation. Maggy Taylor again: *"When we became a company limited by guarantee and established a Board that had a significant impact. Psychologically it shifted the organisation as there are a different set of principles to operate by."*^{xxxi}

³ 'A company limited by guarantee is one where each member guarantees to pay a sum in case of bankruptcy. In this case the guarantee will be set at £1...However, every member will be required to sign a guarantee accepting this liability', extract from ARMA e-newsletter, edition 9, March 2006

⁴ Did not start trading as company until February 2007. The process took longer than expected due to a decision to move banks and with no elected Treasurer in post at the time (see Part 3 regarding Rossana coming to the end of her term as Treasurer)



Part 3: Establishing a Profile 2006 to 2011

2006-2008: Stabilisation

In addition to hosting the special general meeting, the 2006 Edinburgh Conference heralded a number of other changes. Nigel Bilsbrough stepped down as Secretary after six years, though he remained a Member of the Committee. He was replaced by Simon Kerridge who still retains the post. Rossana Dowsett stepped down as Treasurer; during her last Committee meeting she made the following plea for the role to be revised:

'Rossana concluded by saying that the Association now had serious responsibilities to generate income and she saw the future Treasurer's role as being much more strategic, taking a lead in financial planning and trying to avoid too much involvement in day to day processes.'^{xxxv}

The need to re-examine the role meant that Rossana was not immediately replaced. Gwynfor Hughes and Ed Canney volunteered to be Acting Treasurers during 2006/7 and helped with the transfer to CLG. Ed went on to take up the revised Treasurer's position in 2007. Tony Weir, who had been the local liaison for the 2006 Edinburgh conference, and Sheena Bateman were elected to the Committee and Pauline Muya was elected Deputy Chair, External Relations.

However, the most significant change was Ian Carter's appointment as Chair, succeeding Peter Townsend who had resigned after two very busy years. With a new Chair at the helm the following five years in ARMA's recent history have been described as a process of *"stabilisation"*^{xxxvi}.

From 2002 the organisation had instigated a number of substantive but necessary changes to move it away from being a loose network of relatively junior individuals towards becoming an established professional body. Ian Carter taking up the leadership of ARMA was the signal to the outside world of its maturity and widening sphere of influence. At the time of his appointment he was Director of Research at the University of Liverpool and is currently Director of Research and Enterprise at the University of Sussex. He is a leading member of the Brunswick Group of research managers and frequently holds seats on national project boards and steering groups. Pauline Muya says of Ian's appointment, *"his individual profile has attracted more big-hitters"*^{xxxvii}.

Adapting to meet members' needs

To retain these 'big-hitters' ARMA had to ensure that it adapted and expanded its training schedule and membership services to accommodate their needs. Bill Schweri, Director of Federal Relations at the University of Kentucky and a prominent member of the SRA, has a longstanding relationship with **RAGnet**/ARMA. He points to the development of training as a noticeable change over that time: *"In particular, I think the development of levels within its seminar series has added a new dimension to the effort to reach out to a new and more senior audience with education and professional development activities."*^{xxxix}

During 2006 the first residential course for senior managers was held at Warwick (January) and the first Executive Forum was held before the Edinburgh conference. Both were aimed specifically at senior managers and were designed to create a space to discuss frankly strategic issues. To ensure that people attending the residential course had the relevant experience and to ensure a mix of backgrounds members were asked to submit an expression of interest.

Recognising the need to create training appropriate to members' career lifecycles



was an important aspect of developing ARMA's training. Monique Carew, Assistant Director of the School of Biological Sciences at Cambridge University and the original group co-ordinator for Cambridge, attended the first senior managers residential at Warwick. She says: *"This was a pivotal event in changing my perception of the Association. I was able to bring a lot back from that meeting to share with colleagues"*^{xviii}.

The first residential workshop targeting more experienced administrators was run in July 2006 and was also very popular. Once designating training by levels of experience was shown to work, the training sub-committee was able to develop a portfolio of targeted seminars that ran on an annual basis with regular events aimed at entry level, more experienced and senior members.

A mentoring scheme was also launched in October 2005 - an idea Ian Carter brought back from his visit to ARMS in Australia in 2004. It offers senior members the opportunity to engage and pass on their expertise in a way that benefits both themselves and more junior members. The first mentoring scheme facilitated three pairings. The most recent round in 2010 achieved 15 pairings of mentors and mentees and there were, for the first time, *"mentors to spare"*^{xix}.

Credibility and recognition

The growth in members from research intensive universities represents an incremental but important change in perception for the Association. When Rosemary became Executive Administrator in Autumn 2005 she says that one of her personal objectives was *"to increase membership from the Russell Group and 1994 universities"*^{xxi}. ARMA now boasts members from every UK university, and the University of Cambridge is one of the largest group members.

Ian Carter also points to the role of individuals and change of management at these universities that has made them more aware of ARMA. He says: *"Glen Swafford came to Oxford and he had a history with ARMS in Australia so wanted to engage. Phil [Clare] being there helped too, as there were then two people in top management already familiar with ARMA...[at Cambridge, recently appointed] Martin Reavley wanted to ensure that Cambridge was joining in more with the wider community as he recognised that it would be mutually beneficial."*^{xlii}

Monique Carew at the University of Cambridge explains why she became involved: *"At the time research administration was starting to be recognised as playing an important function in the university's reputation for research excellence and we started to look around for organisations that could provide support and training. I have found ARMA training very beneficial to my career...and we now encourage all of our senior management to become a member [of ARMA]"*.^{xliii}

Another indicator of ARMA's growing influence is that it is now included in sector consultations and asked to sit on working groups and steering committees for the Research Councils and funding councils. For example ARMA responded to HEFCE's consultation on the change from RAE to REF and what it said had an influence. This development can be attributed to Ian Carter, whose pre-existing network of contacts has helped to raise the profile of the organisation as a valued *"reference point"*^{xliiv} for research management.

Pauline Muya, a member since 1995, describes experiencing this recognition in a more personal context. *"When I first became a member and researchers were in collaboration with other universities I was able to use my ARMA contacts to sort out admin issues. Now they come in and ask who I know that can help sort out a*



“from 2004 to 2007 membership had nearly doubled and it was time to take stock”

particular problem. It is a subtle change but they recognise that I am involved in a professional body and I know people and have contacts. That acceptance from them says a lot about how things have evolved - our researchers see the payback themselves of my being part of ARMA”^{xiv}.

Active members and membership services

The change of legal status and the creation of a Board of Directors, forced some changes to the governance structures. The Executive Committee had over the years grown to approximately 17 members. Going forward it was prudent to reduce the size of the Board and to persuade more members to become involved in the planning and delivery of ARMA's activities and events.

During 2006 it was decided to open up the membership of the sub-committees to all members, rather than just elected Committee Members. Over that summer there were two workshops with small invited groups of members *‘to explore ways of involving members more actively in the Association.’*^{xv} Out of this process came the ‘Active Members’ initiative which was launched in autumn 2006. This gives members the option to become more actively involved in a variety of different ways such as editing and contributing to papers, hosting events, joining sub-committee and working groups and presenting.⁵

There are now about 30 Active Members and they are critical to the successful operation of ARMA's annual schedule of events and activities. Not only do they contribute their time and energy and input into future development, but it is a mechanism to informally share expertise and offers new members the opportunity to gain the confidence to put themselves forward for election to the Board. This pipeline function is crucial to ensure that ARMA's governing body remains relevant and in step with the needs of the members.

Around the same time that the Active Member initiative was launched, the Board created a new sub-committee to oversee membership services. This was another important development for the Association as it placed itself on a more professional footing. It offers a formal recognition and provides a strategic overview for its non-training activities. It oversees the mentoring scheme, the Joan Hughes Bursary and the occasional paper series. Study tours also now fall under membership services: as the most popular type of event offered by ARMA, it was decided that it should be a benefit restricted to existing members only.

In March 2007 ARMA's membership broke through the landmark 1,000 figure to reach 1,094. From 2004 to 2007 membership had nearly doubled and it was time to take stock. One of the first tasks of the membership services sub-committee was to conduct a members' survey which was led by Tony Weir, a new Board Member from Heriot-Watt University. The survey conducted in March and April 2007, found that 80 percent of members were satisfied or very satisfied with the support and services offered but felt that the Association needed to cater for more diverse needs. Overall they wanted ‘more events and more topics, spread more widely across the UK’.^{xvii} These findings would help to shape the direction of ARMA's development in the coming years.

INORMS Congress 2008

One of the major events of ARMA's history in the last decade is the INORMS Congress. It was held jointly with ARMA's Spring Conference in Liverpool in 2008 and in many respects marked ARMA's coming of age.

⁵ See ARMA e-news, edition 10, October 2006 for full range of active member opportunities.



At the 2006 SRA conference held in Quebec, Ian and Steff volunteered to host the second biennial INORMS Congress. This was no small undertaking. It would be the biggest conference ARMA had ever organised and it would, inevitably, generate a lot of pressure for everyone involved. INORMS attracted more than 500 delegates, from 30 countries and more than 100 speakers. Under Steff and Ian's direction, and with huge input from the organising team, the format of the conference changed to a two-day event with more than 30 parallel seminars, fewer plenary sessions, pre and post conference seminars, poster competition, exhibition and social and orientation events.

This conference is credited with massively raising ARMA's international profile. Many cite it as a pivotal moment in the organisation's history and everyone involved has a story to tell about it.

"I would be remiss if I did not mention that the INORMS meeting in Liverpool was exceptional and set the bar a good bit higher for measuring success," Bill Schweri, University of Kentucky.

"... it was a bit of baptism of fire for me but I was really pleased that it went well...to the extent that some of the US colleagues said it was 'one of the best conferences they had ever been to. That is praise indeed,'" Ian Carter.

".... the INORMS conference was significant as it put ARMA out there internationally [now]...people are looking at ARMA to see what we are doing," Pauline Muya.

"...INORMS conference was fantastic ... not only was the organisation exceptional but the fact that we had a Beatles' tribute band for the Gala Dinner at Aintree racecourse ... as soon as these lads started playing the hairs on the back of my head stood up. They were brilliant....people were asking for their autographs..." Maggy Taylor.

However, it was not without its hitches. Steff recalls that the IT contractors who had finally been brought in to update the back end of the website were running behind schedule and *'it was touch and go whether we would get it done on time'*^{xviii}. On top of that as a new company the Association had no financial history to show as security and though financially sound was struggling to get credit. Rosemary recalls a "few days of uncertainty" when the venue was demanding payment in full and ARMA was waiting for funds to clear in its bank account. After some frantic calls, Board Members were able to expedite delegate payments from their respective finance offices and the problem was resolved in a few days.

The INORMS congress was particularly memorable for Steff because it was her swansong. After 10 years it was time to step down. Steff's contribution to **RAGnet**/ARMA is remarkable. Over the years she has been instrumental in every aspect of ARMA - creating and maintaining the website and on-line booking system from 1998 to 2008, organising conference, leading on training, playing a crucial role in moving the Association towards greater professionalism, delivering the name change and, finally, bringing in external support for the website as part of her own exit strategy.

There was a big thank you at the INORMS Congress. She was given a Veuve Clicquot picnic set, a perfect gift for someone whose favourite colour is orange - orange featured heavily in the branding of the 2008 conference - and who enjoys a tippie. The most surprising aspect about Steff's ten years with **RAGnet**/ARMA is that she never put herself forward for the Chair. Ian Carter believes that this is due to *"a little bit of diffidence in her - and it characterises **RAGnet** a little, this lack [of] self-confidence."* However, like others on the ARMA Board, the progression of Steff's



“ARMA has given advice to research managers from as far afield as the Caribbean, India, Denmark, Malaysia and also the Netherlands”

research management career is reflected in the organisation's own maturity and growing self assurance. Steff could not stay away and re-joined the ARMA Board as Treasurer in 2010. In the two years she was away she has in her own words become *'more of a leader'*. Whether this translates into her taking up the Chair is for a future history to record.

International Support

The INORMS Congress boosted ARMA's international profile, but the Association was already playing a very active international role. With the Association of Commonwealth Universities (ACU), ARMA was heavily involved in offering guidance and training to the West African Research and Innovation Management Association (WARIMA) when it was set up in 2007. A international team including Steff, Bill Schweri, Paul Waugaman, Phil Clare and Pauline Muya all flew out to Ghana at the end of March 2008 to run a 'Fundamentals of Research Management' workshop for senior academics as part of a week-long series of events. ARMA maintains a very close relationship with WARIMA: there was another trip to Liberia in November 2010 and ARMA representatives were back in Ghana to provide more training in February 2011.

ARMA has given advice to research managers from as far afield as the Caribbean, India, Denmark, Malaysia and also the Netherlands helping them set up similar organisations. Pauline attributes some of this eagerness to work with ARMA to the fact that many countries around the world have modelled their education on the British system, so feel a greater affinity to ARMA.

Consolidation: 2008 to 2011

The 2008 AGM held during the INORMS Congress witnessed a number of changes to the Board. David Langley, of the University of Bristol, succeeded Steff as Deputy Chair and Director of Membership Services, Pauline Muya was re-elected as Deputy Chair and Director of Training Services and John Green was appointed Treasurer, replacing John Rogers.

Lita Denny was re-elected to the Board and became Director of Conference Planning, a new post that was created in recognition of the time and effort required to host the annual conference. Lita has a background in event management and has been able to put in place administrative systems and professional support services to ease the burden on the committee of volunteers that pull the Spring Conference together every year.

Engaging with members

A popular benefit, and annoyance, identified by the Bluebell report was the Association's email lists. These were refined a little to make some of the lists 'closed', but it was not until 2008 once the website had been re-developed that on-line Special Interest Groups (SIGs) were launched. These moderated email groups have hugely improved communication among members, as people are able to sign up and control what they receive. It is also an attractive development for commercial members or, for example, members from the Research Councils who can target whom they communicate with and about what. Philip Pothen, Head of Communications at the Arts and Humanities Research Council (AHRC) who joined ARMA in 2009 considers the ability to engage with members through the SIGs one of the main benefits of membership. He says *"there is an arts and humanities email lists which I have found very useful to initiate a dialogue in a way that would not have been quite so easy before."*^{xlix}



Professional Development Framework 2010

2008 onwards has been at time of consolidation for ARMA. Membership continues to grow though less dramatically than in previous years. The Board has focused on refining and improving its areas of activities and how it presents itself. There has been a lot of effort to engage and involve the wider membership to help with the delivery of all activities as seen by the Active Member initiative. A critical stage of its evolution into a professional association seems to be drawing to a close and Board has now turned the spotlight of 'professionalisation' to its training provision.

Ian Carter explains the impetus behind this: *"Now that many of the Board Members have progressed in their own jobs and are themselves leading teams of research administrators, reviewing the benefits and disadvantages of becoming a provider of accredited training has become more pertinent."*ⁱ However, opinion is split on the question of formal accredited or certified qualifications. Rossana Dowsett is not alone in expressing doubts: *"Personally I would want them to focus on training and engaging with funders...I am as yet to be convinced that the effort and cost of certification is worth it."*ⁱⁱ

To be able to make an informed decision on the future direction of ARMA's training provision, the Board appointed a Professional Development Manager in 2010. Marie Garnett is the first member of staff directly employed by ARMA (Rosemary Hatch and Jenny Stevens are employed through Loughborough University). Her job is to *'develop and implement the ARMA Professional Development Framework, to provide the basis on which we create and deliver our training events and other offerings.'*ⁱⁱⁱ

As part of this process ARMA is gathering input from external bodies such as AUA, AURIL and PraxisUnico. Pauline, currently Deputy Chair Training, explains her ambition for developing ARMA's training provision: *"My vision for ARMA's training is ensuring that provision is there across the spectrum, whatever your level. I hope the Framework will show the spread of activities that people are involved in, so that in future we may move towards an accredited programme and it can be used to inform and direct our training schedule."*ⁱⁱⁱⁱ



Conclusion

ARMA started the decade teetering “*on the cusp of a step change*”^{iv}. Over the last ten years there have been a number of events and activities, some small and some big, that accumulatively have affirmed and steadily increased ARMA’s credibility and raised its profile as an influential professional association. Its members have grown dramatically in number; it has assembled the infrastructure required to support this expanding membership and it has nurtured and developed a national and international profile.

As the scope of this history comes to a close there are many challenges in the current environment - not least the pending cuts in university and research funding. How this will affect the organisation is not yet known: it could mean a reduction in membership for the first time in 20 years or, perhaps, members, squeezed in their jobs, will be less able to obtain the support from their employers to volunteer for ARMA’s committees or it might even force a merger with another organisation.

What is certain, though, is that ARMA has developed into a recognised and well-respected association representing a community of members who play an essential role in maintaining the UK’s reputation for research excellence.

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