

Registered Organisation inspection panel member training

Unit 3 *The Project Talk-Through*

Introduction

This module introduces the Project Talk-Through, a central component of every Registered Organisation inspection. It explains the purpose of the talk-through, the stages of the project lifecycle that are reviewed and the types of exploratory questions panel members may choose to ask. The aim is not to prescribe a checklist but to support meaningful discussion and encourage a clear, evidence-based understanding of how an organisation applies its Quality Management System in practice.

What the Project Talk-Through Is

The talk-through is the core element of the inspection visit. It gives the organisation an opportunity to demonstrate how its internal systems operate during a real project, using a recent piece of work as a case study. By walking through the project step by step, the panel can see how quality is embedded, monitored and delivered in the organisation's day-to-day archaeological practice.

Purpose of the Talk-Through

During the talk-through, the panel should develop a well-rounded understanding of how quality is managed across the entire project lifecycle. This includes the planning stages, fieldwork, post-excavation processes, reporting and archiving. Throughout the discussion, panel members listen for evidence of compliance with CifA Standards and guidance, as well as signs of effective communication, consistent application of procedures, proportionate use of methods and active commitment to continual improvement.

How to Approach Questions

In this module, you will explore each stage of the project lifecycle and consider example questions that panel members might ask. These questions are illustrative only; their purpose is to support professional judgement rather than to dictate a fixed sequence. They should be used flexibly, guided by the organisation, the nature of the project and the issues that emerge during discussion. The goal is to encourage open, reflective conversation that reveals how the Quality Management System has been applied in real practice.

Initial Engagement

The first stage examines how the organisation engaged with the client and established the groundwork for the project. Panel members may explore how initial discussions took place, how scope and objectives were communicated and what early steps ensured strong foundations for collaboration. This stage offers insight into clarity, expectation-setting and the establishment of effective communication.

Defining Objectives

Here, the focus shifts to how project objectives were developed. A key interest is whether the aims were clear, appropriate and aligned with both the project's purpose and CIfA Standards. This stage often reveals how the organisation balances professional requirements with client needs and whether objectives were reviewed or updated as the project progressed.

Developing the Project Design

The project design stage provides insight into planning, proportionality and compliance with standards. Panel members may explore how the design was created, who contributed to it and how the organisation ensured it was achievable within available resources and constraints. This part of the discussion helps uncover the organisation's approach to risk, proportionality and quality in early planning.

Applying Standard Operating Procedures

This stage looks at how internal systems and Standard Operating Procedures supported consistency during fieldwork and recording. Panel members may explore which SOPs applied, how they shaped decisions in practice and how any necessary adaptations were authorised. This discussion highlights whether systems are well understood and consistently implemented.

Ensuring Competence

Competence is fundamental to high-quality archaeological work. In this part of the talk-through, panel members explore how staff were selected for roles, how competence was assessed and what training or CPD supported the project. This stage often reveals how the organisation manages staff development, identifies skills gaps and ensures appropriate supervision.

Carbon Reduction Planning

Carbon reduction and environmental considerations are now integral to responsible project design. Panel members may explore what measures were taken to minimise environmental impact, how decisions were made and whether the organisation tracks its carbon-related outcomes. This offers insight into long-term sustainability practices.

Audits and Reviews

This stage looks at internal checks and quality control mechanisms. Panel members may ask about audits carried out during fieldwork or reporting, how issues were identified and resolved and how results were communicated to staff. The discussion highlights transparency, responsiveness and how well the organisation monitors its own performance.

Feedback and Communication

Effective communication underpins good project management. This stage explores how dialogue with clients and stakeholders was maintained, what feedback was received, how the organisation

responded and how unexpected developments were communicated. The panel can assess whether communication was timely, professional and well coordinated.

Record Keeping

Record keeping supports transparency, accountability and long-term data integrity. Panel members may explore the tools or systems used, how accuracy and version control were maintained and who oversaw compliance. This stage often reveals how well the organisation's systems support reliability and traceability.

Risk Management

Risk management examines how risks were identified, monitored and revised as the project progressed. Panel members may explore initial risk assessments, how they were updated and how real risks were handled when they arose. This reveals resilience, adaptability and the organisation's capacity to manage challenges responsibly.

Stakeholder Involvement

Some projects rely heavily on stakeholder engagement. Here, the panel may explore how stakeholders were involved in decision-making, how consultations were handled and how their input shaped the project. This stage can highlight collaboration, transparency and responsiveness when work evolves unexpectedly.

Post-Excavation Quality Management

Post-excavation work demands accuracy, rigour and strong systems. Panel members may discuss how assessments were carried out, what supported interpretive quality and how material was prepared for long-term archiving. This stage provides insight into data quality, consistency and stewardship responsibilities.

Continuous Improvement

The final stage examines how the organisation learns from its work. Panel members may explore lessons learned, how insights were shared internally and whether any SOPs or processes were updated as a result. This is an important indicator of how well the organisation reflects on its practice and evolves over time.