

A Structured Roadmap for implementation of RM 1 to RM 4 using RM Comp



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Executive Summary

Introduction¹

A key objective of all universities and research performing organisations in the European Research Area is to deliver international excellence in all areas of research. The European Commission recognises the major contribution played by research managers in enabling research of the quality and impact which characterises world-class research when it notes “Performing high-level research and innovation requires the support of other professionals. Amongst them, research management and research technician careers deserve proper recognition, including by way of further analysis and alignment at the level of the Union. Research management capacity should be strengthened by defining required skills and competences, developing relevant training, fostering comparability, and allowing their holders to effectively manage and support research and innovation”.² Europe through Action 17 of the ERA Policy Agenda (and the subsequent policy agenda A New Era in Research Management 2025-2027)³ is committed to attracting the very best research managers and helping them to develop their careers and make their career choices realistically and effectively, whatever their chosen specialty. *CARDEA believes that this IMPLEMENTATION FRAMEWORK reflects and incorporates the principles of our recently created [European Charter for Research Managers](#) and supports the ethos of the [HR Excellence in Research Award](#).*

The purpose of this document is to inform universities and research performing organisations in the ERA on steps they can take to enable a Career Management Structure for Research Managers at all levels (RM 1 to RM 4). ***This is a structured roadmap for implementation of RM 1 to RM 4 using RM Comp and the proposed Charter for Research Managers whilst embracing EC HR Excellence in Research.*** This implementation framework is vitally important in the context of Europe’s capability to realise its objectives in relation to the actions of the ERA Policy⁴ and in the context of the strategically important role of research manager in the research mission of Europe.

This framework is inspired by the European Commission’s New ERA⁵ which encourages Universities to create “Career development conditions to attract and retain the best researchers in Europe are necessary in the global race for talent.” This framework is intended to provide clear standards, and to be sufficiently flexible for universities and research performing organisations in all member states to adapt it to the needs of their research management roles and their research communities.

¹ Inspiration from UCC Employment and Career Management Structure for Research Staff [HR Research Policy and Guidelines UCC | University College Cork](#)

² [OJ:C_202301640:EN:TXT.pdf \(europa.eu\)](#)

³ [ERA Actions \(2025-2027\) | European Research Area Platform](#)

⁴ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0628&from=EN>

⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0628&from=EN>

This document sets out guidelines on the employment and career management of research managers. It is hoped that these guidelines will support the implementation of a career framework for Research Managers in the European Research Area.

Scope of the Framework

This Implementation Framework sets out guidelines for the employment, progression and career development of research managers. Before we begin it is important to define what is meant by the term Research Manager.

Definition of Research Manager

Research Manager is an “umbrella term” which encompasses a wide range of research management roles and specializations at the “interface of research”⁶ under a single classification. It serves to group together multiple research management roles and specialized subject matter experts that share common role objectives and competencies. Research Managers are based in all types of research performing organisations, including public and private universities, research institutes, research funding organisations, medical institutions, NGOs, companies, public authorities, and so on.

This is our definition: **Research Managers enable, facilitate and support the performance of research in all its applications. Research Managers hold generalist or specialized roles within the research and innovation ecosystem.**

Research Managers can work as research policy advisers, pre-award and post-award officers, project managers, impact managers, science communicators, financial managers and advisors, legal advisors, contract and compliance managers, data stewards, open science officers, research infrastructure managers and operators, equality, diversity and inclusion advisors, research ethics advisors, knowledge and technology transfer officers, innovation managers and business developers, knowledge brokers, human resource managers in research, AI experts, and leaders of research development/grant offices, etc.

⁶ Agostinho, M., Moniz Alves, C., Aresta, S., Borrego, F., Borlido-Santos, J., Cortez, J., ... Vidal, S. (2018). The interface of science: the case for a broader definition of research management. *Perspectives: Policy and Practice in Higher Education*, 24(1), 19–27. <https://doi.org/10.1080/13603108.2018.1543215>

Institutional Implementation Framework for RM's

The following is an implementation framework for career progression and development of research managers in Europe. It includes clearly defined levels within the research manager's career path, with a **strong emphasis on** continuous professional training and development at each level. Guidelines will continue to be developed regarding the role as it is a continuously evolving role.

The framework is supported by career architecture that includes RM Comp, [CARDEA Academy Training](#), RM 1 to RM 4, role mapping, recruitment, contract management, a research manager's personal and professional development tool kit and examples of job descriptions leading to a consistent recruitment process.

Entry into the research management career structure will occur following open transparent and merit-based recruitment. As with the European Framework for Research Careers, in this framework there are four broad profiles for Research Managers, which are independent of any sector. The Implementation Framework **categorizes** research manager roles in the following order:

- RM 1 First Stage Research Manager
- RM 2 Recognised Research Manager
- RM 3 Established Research Manager
- RM 4 Senior Research Manager



This Implementation Framework is "sector neutral." The descriptors apply to all Research Managers, independent of where they work in the private or public sector (i.e. companies, NGOs, research institutes, research universities, universities of applied sciences, university medical centres, local-, regional- or national authorities, funding organisations or consultancies). Regardless of any particular profession or specialisation, one can outline broad profiles that describe the different levels within the broad categorisation of Research Manager.

It is envisioned that direct entry through open competition (recruitment) can occur at any level. It is envisaged that qualifications will not be a barrier to entry into the profession.

Research Manager Profile Descriptors

The intention of having a Research Manager Profile Framework is to support the research community: research managers, researchers, their employers (universities, research institutes and companies), funders and public authorities. These actors can voluntarily use the framework as they see appropriate within their own institutional or national context.

First Stage Research Manager (RM 1)⁷

The term First Stage Research Manager refers to research managers in the first two years (full-time equivalent) of their research management activity whilst demonstrating the competencies and skills for successful performance in the role. The role requires a basic understanding of the research/business structures, operations, and includes responsibility for implementing and achieving results.

Recognised Research Manager (RM 2)

The term Recognised Research Manager refers to research managers with an intermediate level of experience in their research management activity whilst demonstrating competencies and skills for the successful performance in the role. The role requires a moderate understanding of overall research/business operations including responsibility for monitoring the implementation of research strategy. This has limited or informal responsibility for colleagues and / or needs to consider broader approaches or consequences through own actions rather than through others.

⁷ [Competence Framework | University College Cork](#)

Established Research Manager (RM 3)

The term Established Research Manager refers to research managers with an advanced level of experience in their research management activity whilst demonstrating competencies and skills for the successful performance in the role. The role requires strong understanding of the organisation's environment, operational plans, current strategic position and direction with strong analytical skills and the ability to advise on strategic options for the research/business. This may include formal responsibility for colleagues and their actions; and that their decisions have a wider impact.

Senior Research Manager (RM 4)

The term Senior Research Manager refers to research managers with an expert level of experience in their research management activity whilst demonstrating the competencies and skills for successful performance in the role. The role requires expert knowledge to develop strategic vision and provide unique insight to the overall direction and success of the research/organisation. This includes formal responsibility for research/business areas and his / her actions and decisions have a high-level strategic impact.

For the purposes of the Framework, RM 1 and RM 2 profiles should be considered early to mid-stage research managers and RM 3 and RM 4 profiles should be considered leadership level research managers.

This framework also provides a structured programme of professional training and development, to enable Research Managers to acquire the skills and experience necessary to progress their careers. The completion of professional training and development at the RM 1 stage will enable Research Managers to compete for an opportunity at the RM 2 stage and so on, either internally within their own organisation or externally within academia or the private sector.

This framework creates a systematic and continuous career development process for Research Managers in the European Research Area. Progress through the levels will be based on open transparent and merit-based recruitment in line with the principles of **HR Excellence in Research**.⁸

⁸ [HR Excellence in Research | EURAXESS](#)

Research Manager Role Mapping^{9 10}

Role mapping is the process of systematically aligning the competencies required in an organisation's job descriptions with a structured competency framework like RM Comp for Research Managers.¹¹ It helps organisations understand how existing roles correspond to defined proficiency levels (Foundational to Expert) and career stages (RM1 to RM4). By identifying overlaps, gaps, and development opportunities, role mapping supports clearer career pathways, targeted training, and strategic workforce planning. It also enables Research Managers to see how their current responsibilities and skills relate to progression opportunities and available learning resources, such as those offered by the CARDEA Academy.

While each organisation may have its own way of classifying Research Manager roles these methods are often shaped by local structures, funding models, or historical practices. Following the publication of RM Comp there is a growing need to adopt a unified framework that supports clarity, consistency, and career progression across institutions in Member States.

Below are the steps your organisation can take to implement RM Comp and map roles to RM1, RM2, RM3 and RM4. These guidelines are proposed to support the mapping of Research Manager roles e.g., internal roles to RM levels 1 – 4, inform HR and align job descriptions and recruitment advertisements as outlined in the Recruitment and Selection chapter of this report.

Step-by Step Guide to Aligning Competencies with RM Comp

Step 1: Identify and List Competencies

- Review your organisation's RM job descriptions.
- Extract and compile a comprehensive list of all competencies mentioned across Research Manager roles.

Step 2: Benchmark Against RM Comp

- Compare your compiled list with the competencies outlined in RM Comp.
- Note similarities, gaps, and overlaps.

Step 3: Understand RM Comp Proficiency Levels

- RM Comp defines **four proficiency levels** for each competency:
 - **Foundational**
 - **Intermediate**
 - **Advanced**

⁹ [PDF-Final.pdf.pagespeed.ce.dsiwXnohpU.pdf.pdf](#) ARMA UK for Inspiration

¹⁰ RM Comp and RM 1 to RM 4 [Competence Framework | University College Cork](#)

¹¹ [What is Role Mapping in HR? | HR Lineup](#)

- **Expert**
- Each level includes **specific learning outcomes** that describe expected knowledge and skills.

Step 4: Align Competencies and Learning Outcomes

- Map your organisation's RM competencies to the RM Comp competencies.
- Where possible, align each competency with the corresponding RM Comp learning outcomes.

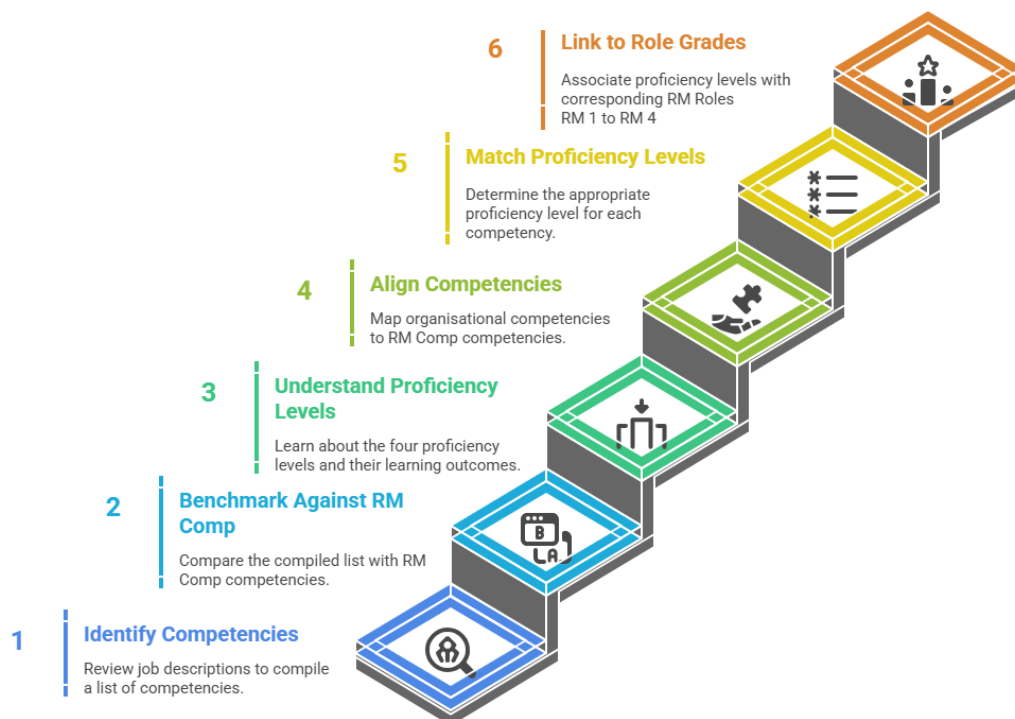
Step 5: Match Proficiency Levels

- For each competency, determine the appropriate RM Comp proficiency level based on the role's requirements.
- Use the learning outcomes to guide this matching process.

Step 6: Link Proficiency Levels to Role Grades

- RM Comp proficiency levels may be associated with RM role grades as follows:
 - **Foundational** → RM1
 - **Intermediate** → RM2
 - **Advanced** → RM3
 - **Expert** → RM4

Aligning Competencies with RM Comp



Role Mapping Table: Aligning Competencies with RM Comp

Instructions:

- Column 1: List each competency found in your organisation's job descriptions.
- Column 2: Identify the closest matching competency from the RM Comp framework.
- Column 3: Note any similarities, differences, or gaps between the two.
- Column 4: Assign the appropriate RM Comp proficiency level (Foundational, Intermediate, Advanced, Expert).
- Column 5: Record the relevant learning outcomes from RM Comp for that level.
- Column 6: Map the proficiency level to the corresponding role grade (RM1–RM4).

Table 1: Mapping Organisational Competencies to RM Comp Framework and Role Grades (RM1–RM4)

Competency from Org Job Description	RM Comp Competency Match	Similarities / Gaps / Notes	Mapped Proficiency Level	Learning Outcomes (from RM Comp)	Mapped Role Grade (RM1–RM4)

For additional examples of role mapping strategies, please refer to Appendix E.

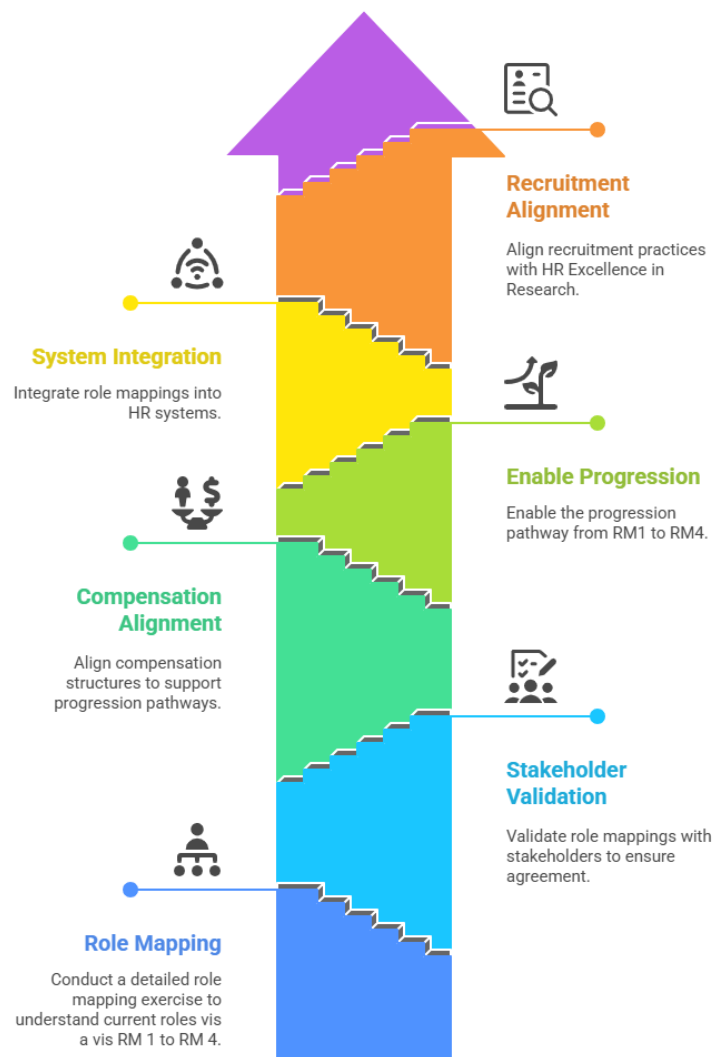
Steps to Implementation Framework¹²

- Role Mapping Exercise (as above)¹³
- Validate with Stakeholders – Seek Agreement
- Align compensation to existing (or create new) pay structures
- Enable the Progression Pathway RM1 to RM4
- Integrate RM 1 to RM 4 into HR Systems
- Align recruitment to HR Excellence in Research and Charter for RM's

¹² [Rethinking Job Architecture: A Compensation Professional's Guide to Systematic Role Alignment - MorganHR](#)

¹³ [An HR's guide to role mapping - Testlify](#)

Steps to Implementation



Validate with Stakeholders

To successfully implement a unified RM role classification, it's essential to validate the framework with key stakeholders across the institution. This ensures the structure reflects operational realities, gains buy-in and aligns with existing policies and budgets. Engaging HR, Finance, the Research Office, and current Research Managers will help refine the framework and support a smooth rollout.

Steps to Validate with Stakeholders:

- **Identify Stakeholder Groups:** Include HR (for job grading and compensation), Finance (for budget implications), Research Office (for operational alignment), and current RMs (for practical insights).
- **Conduct Stakeholder Workshops or Focus Groups:**

- Present the RM1–RM4 and RM Comp frameworks.
- Invite feedback on role definitions, progression pathways, and compensation alignment.
- **Gather Role-Specific Feedback:**
 - Ask current RMs to map their responsibilities to the proposed levels.
 - Identify gaps or overlaps in the framework.
- **Align with HR and Finance Policies:**
 - Ensure the structure fits within existing job families and pay scales.
 - Discuss funding sources and sustainability.
- **Document Feedback and Adjust Framework:**
 - Capture insights and concerns.
 - Refine role descriptions and progression pathways accordingly.
- **Secure Endorsement:**
 - Present the revised framework to senior leadership or governance bodies for formal approval.

Align with compensation bands/scales

To ensure the RM role framework is both sustainable and equitable, it should be aligned with existing institutional or national member state compensation scales or bands. This step helps translate role definitions into salary levels that reflect responsibility, experience, and national benchmarks. It also supports transparency and career progression.

Steps to Align with Compensation Bands/scales:

- **Review Existing HR Pay Structures:**
 - Identify current job families and salary bands relevant to research support roles.
 - Understand how progression and salary grading currently work.
- **Map RM Levels to Salary Bands:**
 - Match RM1–RM4 roles to appropriate pay grades based on complexity, responsibility, and required experience.
 - Consider internal equity and external benchmarking.
- **Conduct Market Benchmarking:**

- Compare RM salaries with peer institutions nationally and internationally.
- **Engage HR and Finance Teams:**
 - Discuss implications for budget planning and recruitment.
 - Ensure alignment with institutional and national pay policies and funding constraints.
- **Develop a Compensation Narrative:**
 - Clearly explain how each RM level corresponds to salary expectations.
 - Include rationale for differences in pay and progression criteria.
- **Plan for Implementation and Review:**
 - Phase in changes if needed (e.g., starting with new hires on a pilot phase).
 - Set up regular reviews.

Enable the Progression Pathway

To support career development, it's important to define clear progression pathways for moving from RM1, RM2, RM3 to RM4. ***Please note that lateral or non-linear movement is also an option.*** Progression should reflect increasing levels of responsibility, expertise, leadership, and strategic impact. Establishing this helps RM's understand what's expected at each level and enables line managers to support growth through structured development plans. Please refer to RM Comp Learning Outcomes, generic role descriptions and all appendix to assist with this process.

Steps to Enable Progression Pathway:

- **Define Core Competencies for Each Level:**
 - Identify skills, knowledge, and behaviours expected at RM1, RM2, RM3, and RM4.
 - Include technical, interpersonal, and strategic competencies. (As per RM Comp)
- **Establish Experience Thresholds:**
 - Set minimum years of relevant experience or demonstrated performance for each level as per your organisation or member state practice.
 - Consider both internal and external experience.
- **Outline Performance Expectations:**

- Link progression to measurable outcomes (e.g. successful grant management, leadership in strategic initiatives) as per RM Comp Learning Outcomes
- **Incorporate Professional Development:**
 - Require completion of RM training, certifications, or available programmes such as those in the CARDEA Academy [CARDEA Academy - open access to online training resources](#).
 - Encourage participation in external networks.
- **Create a Review and Promotion Process:**
 - Define how progression is assessed (e.g. annual review, promotion panels).
 - Ensure transparency and fairness in decision-making.
- **Align with Institutional Values and Strategy:**
 - Ensure criteria reflect the organisation's and or member state research priorities and culture.
 - Embed equality, diversity, inclusion, and innovation as part of progression.

Integrate into HR Systems and or HR Excellence in Research and Charter for RM's

Steps to Integrate into HR Systems, HR Excellence in Research and Charter for RM's:

- **Update Job Descriptions**
 - Reflect RM1–RM4 role definitions and job descriptions, responsibilities, and required competencies cognisant of HRS4R, RM Charter.
 - Ensure clarity on expectations and progression pathways.
- **Align Recruitment Materials:**
 - Use the RM framework in job adverts, person specifications, and interview criteria.
 - Tailor recruitment panels to assess candidates against level-specific competencies.
- **Embed in Performance Review Processes:**
 - Link annual reviews (if appropriate) to RM level expectations and progression criteria.

- Use the RM Comp and tool kits to identify training and development needs and career goals.
- **Train HR and Line Managers:**
 - Provide guidance on applying the framework in recruitment and performance management.
 - Ensure consistent interpretation across units within the organisation.
- **Integrate into HR Information Systems (HRIS):**
 - Tag RM roles within HR databases for tracking and reporting.
 - Enable data-driven workforce planning and career development analytics.
- **Monitor and Refine:** collect feedback and monitor implementation

Research Manager's Personal and Professional Development

Introduction

The European Competence Framework for Research Managers (RM Comp)¹⁴ was developed to provide a consistent, user-friendly framework for RMs across various career stages and organisational contexts. This framework outlines seven core competence areas, across four proficiency levels from foundational to expert.

1. Cognitive Abilities/Personal Attributes include essential skills such as creativity, critical thinking, and strategic planning that are necessary for effective leadership and adaptability. focus on interpersonal abilities crucial for positive workplace interactions, such as stress management, conflict management, and reliability
2. Technical Proficiency encompasses specialized skills like data analysis, legal skills, and AI applications relevant to research contexts.
3. Research Project Oversight covers skills necessary for managing research projects effectively, including project planning and evaluation.
4. Stakeholder Engagement involves developing and maintaining productive partnerships with various stakeholders.
5. Line Management and Talent Development emphasize team performance, change management, and talent identification.
6. Communication skills are crucial for maintaining relationships and disseminating research findings.
7. Subject Matter Expertise/Specialised Knowledge involves deep knowledge in specific sub-type Research Management roles.

These categories collectively ensure RMs are well-equipped to navigate and excel in their roles.

¹⁴ [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

RM Comp facilitates professional development by offering clear learning outcomes and progression models, encouraging RMs to enhance their skills through diverse training methods. The framework aims to standardize RM competencies, support career planning, and promote the recognition and value of RM roles across Europe. The comprehensive identification of competencies for Research Managers (RMs) was achieved through a co-creation process involving surveys, expert discussions, and HR practitioner insights. These competencies are categorized into nine key areas.

Given the fluid and flexible nature of the research management profession, with constantly emerging roles and fields, RM Comp accounts for several key aspects:

- Entry into the profession can occur at various levels based on educational **and or professional** background and expertise, with recognition that higher-level entrants may need development in certain competency areas
- Professional development should be possible both vertically and across specialisations, enabling movement between roles at the same or higher levels
- Leadership in research support services should be recognized as a specialised expertise, and leadership skills should be acknowledged across all competency areas
- RM Comp should remain a dynamic document that evolves with the profession



CARDEA Training and Development

The Implementation Framework provides a structured approach to training and career development for Research Managers, complementing existing organisational training to create a continuous professional development pathway. It empowers Research Managers to actively plan their careers and access targeted learning opportunities that support both their current roles and long-term goals.

Central to this is the [CARDEA Academy](#), which offers free, flexible, and high-quality online training aligned with RM Comp. Designed for all career stages (RM1–RM4), the Academy’s modules focus on core competencies and are delivered by experienced professionals. This open-access training is a vital resource for building capability and advancing within the profession. The training is flexible, self-paced, and available without travel, or cost, making it especially accessible to Research Managers in Widening Countries.

Each module is structured to support learning outcomes tied to CARDEA’s four proficiency levels: Foundational, Intermediate, Advanced, and Expert. Upon completing all modules, learners can earn a CARDEA micro-credential awarded by the University of Macerata at no cost. This recognition not only validates their learning but also supports progression through the RM career stages. By engaging with CARDEA Academy’s resources, Research Managers can build the skills and competencies needed to advance professionally and contribute more effectively to their institutions.

CARDEA Tool Kit

The CARDEA Toolkit is designed to support professional development and growth. It includes a variety of tools and resources aimed at enhancing knowledge, skills, and abilities, as well as facilitating effective training and mentoring. The toolkit comprises the following components:

- Knowledge, Skills, Abilities (KSA) – Self-Assessment Tool
- Training Needs Analysis—Guided Assessment Tool
- Professional Development Plan for RMs – Template
- Mentoring Workbook
- Reflective Toolkit

All templates and guides are provided in Appendix C [at this link](#) for your convenience.



Knowledge, Skills, Abilities (KSA) – Self-Assessment Tool

CARDEA's self-assessment tool is designed to assist you in your role as a Research Manager, facilitating your progression from RM1 to RM4. Self-assessment is a key element of lifelong learning and career advancement. It is highly recommended to seek input from a mentor and/or supervisor, as their guidance can help you identify learning needs and establish career goals. (*see mentoring guide)

The four components of this tool are designed to assess your strengths and areas for improvement in the role of a research manager:

1. The Self-Assessment Tool: The Research Manager assesses their knowledge, skills, and abilities in each competency area. They indicate whether a specific area requires professional development, specify when follow-up is planned, and offer the chance to provide at least one example per competency area illustrating how the competency is incorporated into their professional practice.

2. Training Needs Analysis Individual: The Research Manager identifies which area(s) they will focus on for their learning.

3. Training Needs Analysis Organisational: The organisation identifies which area(s) they will focus on for their RM learning goals.

4. Professional Development Plan: This template supports the Research Manager in defining the action steps for each skill and/or competence they want to develop.

These tools have the following potential uses:

- Provides the foundation for professional development.
- Documents current competencies.

- Identifies individual learning needs.
- Guides to the orientation of new staff.
- Formalizes an annual learning plan to identify areas for professional development.
- Offers a framework for reflective practice and peer feedback.
- Identifies group learning needs when completed by teams either individually or collaboratively within an organisation.

Once the Research Manager has identified areas for professional growth from the self-assessment tool, they can refer to the European Competence Framework for Research Managers¹⁵ to access learning outcomes to support their career development.

Please see Appendix C [at this link](#) for Self-Assessment Tool Forms and Guidelines.

Training Needs Analysis Individual

The Training Needs Analysis (Individual) is a guided assessment tool designed to help RM's identify their specific training and development needs. By systematically evaluating current skills and knowledge against the requirements of their roles, Research Managers can pinpoint areas for improvement and prioritize their learning objectives. This tool facilitates a structured approach to professional growth, ensuring that training efforts are aligned with both personal and organisational goals.

All templates and guides related to the Training Needs Analysis (Individual) are provided in Appendix C.

Training Needs Analysis Organisational

The CARDEA Organizational Training Needs Analysis tool is a comprehensive assessment tool designed to identify the training and development needs of Research Managers within an organisation. By evaluating the collective skills, knowledge, and abilities of the RM workforce against the strategic goals and operational requirements, this tool helps organisations pinpoint areas for improvement and prioritise training initiatives. It facilitates a structured approach to enhancing overall organisational performance and ensuring that training efforts are aligned with business objectives.

All templates and guides related to the Training Needs Analysis (Organisation) are provided in [Appendix C](#).

¹⁵ [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

Professional Development Plan

The CARDEA Professional Development Plan is a structured template designed to help Research Managers to outline their career goals, and the steps needed to achieve them. This tool encourages thoughtful reflection on current skills, experiences, and aspirations, enabling individuals to create a personalised roadmap for their professional growth. By setting clear objectives and identifying necessary resources and actions, the Professional Development Plan supports continuous development and career advancement.

All templates and guides related to Professional Development Plans are provided in [Appendix C](#).

Other CARDEA Tool Kits and Templates

Mentoring Workbook

The CARDEA Mentoring Workbook is a comprehensive guide designed to support both mentors and mentees throughout the mentoring process. It includes a variety of tools, exercises, and resources aimed at fostering effective communication, setting goals, and tracking progress. By providing structured activities and reflective prompts, the workbook helps to ensure that mentoring relationships are productive and mutually beneficial.

All templates and guides related to Mentoring are provided in [Appendix C](#).

Reflective Workbook

The CARDEA Reflective Workbook is a structured guide designed to help Research Managers engage in meaningful self-reflection. It includes a variety of exercises and prompts that encourage thoughtful analysis of personal experiences, actions, and learning. By facilitating regular reflection, this workbook supports continuous personal and professional growth, helping individuals to gain deeper insights and improve their practices.

All templates and guides related to Reflection are provided in [Appendix C](#).

Recruitment and Selection

Introduction

Open, transparent, and merit-based recruitment¹⁶ is crucial for the recruitment of research managers within the European Research Area. This approach ensures that the most suitable candidates are selected, fostering a culture of excellence and innovation throughout member states. By adhering to the principles of HR Excellence in Research, institutions can guarantee equal opportunities, enhance mobility, and attract top RM talent from diverse backgrounds. Implementing these practices not only strengthens the integrity of the recruitment process but also contributes to the overall advancement of research and development across Europe. The following information is in line with PILLAR 2 – Researchers Assessment, Recruitment and Progression of the European Charter for Researchers¹⁷ and CARDEA Charter for Research Managers [See Annex B].

All recruitment should embrace the following:

- (i) Variations in the chronological order of CVs [Career breaks or variations in the chronological order of CVs should not be penalized]
- (ii) Seniority [The levels of qualifications required should be in line with the needs of the position]
- (iii) Non-discrimination [Employers and/or funders of research managers should not discriminate against research managers in any way based on gender, age, ethnic, national or social origin, religion or belief, sexual orientation, language, disability, political opinion, social or economic condition]

Pre-Advertising

The recruitment process is initiated once a vacant post is identified, and the hiring manager has either received internal organisational approval for the role or has received official notification from a funding body confirming they are to receive a grant.

Advertising

According to HR Excellence in Research guidelines, all posts should ideally be advertised for a minimum of 4 weeks. However, the final decision rests with each organisation.

To assist organisations CARDEA has developed generic job advertising templates for the following RM positions available in Appendix A:

- RM 1 First Stage Research Manager
- RM 2 Recognised Research Manager
- RM 3 Established Research Manager
- RM 4 Senior Research Manager

¹⁶ [otm-r-finaldoc_0.pdf](#)

¹⁷ [EUR-Lex - 52023DC0436 - EN - EUR-Lex](#)

- Information on the Organisation, Centre or Unit, should be included in the material for advertisement.
- Applications are submitted in accordance with internal organisational guidelines.

Shortlisting

The shortlisting process involves a thorough review and evaluation of candidate applications to identify those who most closely meet the selection criteria. This step is crucial in creating a manageable and organised interview schedule. Additionally, it includes contacting candidates who will not be invited to interview for the position, ensuring clear communication throughout the hiring process.

Proposed Step by Step to Shortlisting

- The Hiring Manager and/or Human Resources should manage the short-listing process and should identify one or more other individuals [depending on organisation regulations and practice] who have relevant knowledge of the area and who will be involved in making selection decisions. This is to ensure objectivity in the selection process.
- It is suggested that the maximum number of candidates short-listed for interview does not exceed six; this is to ensure the process is manageable.
- Candidates should be short-listed based on the criteria identified in the advertisement for the post.
- A date should be agreed for interview, which ensures candidates are given sufficient notice prior to attending for interview, ideally 2 - 4weeks after short-listing.
- Following short-listing the Hiring Manager and or Human Resources will contact the candidates being invited for interview to advise them of the arrangements i.e. time/venue etc.
- It is suggested that the Hiring Manager and or Human Resources retain a record of how decisions were made at short-listing for any candidates who request feedback regarding their application for the post having regard to [Freedom of information - European Commission](#).
- Those candidates not shortlisted should receive a regret letter from the Hiring Manager and or Human Resources as soon as possible following short-listing.

Below are examples of email wording for use which can be amended to suit your organisation

- [Not successful at shortlisting](#)
- [Invitation to interview](#)

Interviews

- Interviews may be conducted via video conference for candidates located outside of your Member State and in accordance with your own organisation's policy in this regard.
- The Hiring Manager and or Human Resources should retain a record of how decisions were made at interview. This should be kept as a record for candidates who request feedback or under the Freedom of Information Act.¹⁸
- References should be obtained for the successful candidate in accordance with your own organisation's policy in this regard.
- A Contract of Employment should issue in line your own organisation's policy in this regard.
- The Hiring Manager and or Human Resources should contact unsuccessful candidates following interview to advise the outcome.

Below is an example of email wording for use which can be amended to suit your organisation

- [Not successful at interview](#)

Offer of appointment

- HR or Hiring Manager will contact the successful candidate and make the formal offer of employment in accordance with your own organisation's policy in this regard.

Contract of employment

- Normally HR will issue the Contract of Employment and seek a work authorisation (if applicable) in accordance with your own organisation's policy in this regard.

¹⁸ [Freedom of information - European Commission](#)

Develop Job Descriptions using RM Comp

Introduction¹⁹

RM Comp, and its 7 main competence areas, 50 competencies, and 800 learning outcomes, provides a comprehensive foundation for creating detailed and effective job descriptions. By aligning these competencies and learning outcomes with the specific requirements of each Research Manager role (RM 1, RM 2, RM 3, and RM 4), organisations can ensure that job descriptions accurately reflect the skills and expertise needed at each level. *Please see Appendix A for some generic examples spanning RM 1 to RM 4.*

Steps to Develop Job Descriptions using RM Comp²⁰

A. Identify Key Competence Areas:

Review the 7 main competence areas in the framework. These areas will serve as the primary categories for the job description.

B. Examples of competence areas might include:

Cognitive Abilities, Technical Proficiency, Research Project Oversight, Stakeholder Engagement, Line Management and Talent Development, Communication Skills, and Subject Matter Expertise.

C. Select Relevant Competencies:

Within each competence area, select the competencies that are most relevant to the specific Research Manager role. For example, RM 1 will focus on foundational competencies, while RM 4 would require advanced competencies.

D. Align Learning Outcomes:

For each selected competency, identify the learning outcomes that demonstrate the required proficiency level (e.g., intermediate for RM 2, advanced for RM 3, expert for RM 4).

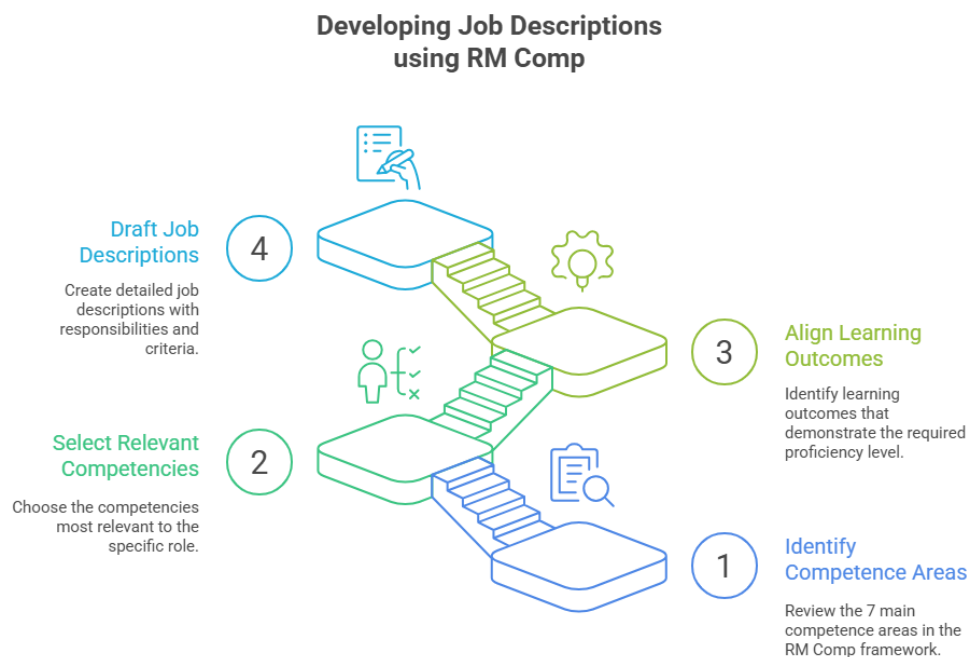
Ensure that the learning outcomes are specific, measurable, and aligned with the responsibilities of the role.

¹⁹ <https://hrmhandbook.com/hro/model/harvard-model/>

²⁰ [Full article: Building strategic human capabilities that drive performance](#)

E. Draft Job Descriptions:

- Provide a brief overview of the role, including the level of experience required and the strategic impact of the position.
- List the main responsibilities, grouped by competence area. Use the selected competencies and learning outcomes to detail the specific skills and tasks.
- Outline the essential criteria that candidates must meet, including educational background, cognitive abilities, technical proficiency, and other relevant skills.
- Specify the qualifications or previous professional experience needed for the role, ensuring they align with the competencies and learning outcomes.



Appendix A: Research Manager Job Descriptions

[Generic]

Job Description: Research Manager 1 (RM 1)

Position Overview: The Research Manager 1 (RM 1) is an entry-level role for individuals in the first two years of their research management career. This position requires a foundational understanding of research and business structures, operations, and a commitment to achieving results. The RM 1 will demonstrate competencies across various domains to support effective research management. Please refer to European Competence Framework for Research Managers²¹ for learning outcomes under proficiency level “foundational”.

What you will bring to the role:

1. Cognitive Abilities/Personal Attributes:
 - Basic understanding of the importance of creativity in research and its critical role in problem solving.
 - Is open to learning new skills and approaches to identify and analyse issues clearly.
 - Ability to conduct basic strategic planning analyses utilising tools such as SWOT analysis.
 - Able to identify tasks and prioritise them in order to develop an individual schedule and perform the work efficiently.
2. Technical Proficiency:
 - Understands and applies basic data collection techniques such as surveys, interviews, and observations.
 - Experience in creating simple data visualizations, including bar charts, histograms, and scatter plots.
 - Understands the basic principles of contract analysis and interpretation.
3. Research Project Oversight:
 - Understanding of the foundational concepts and principles of project management within a research context.
 - Evidence of basic skills in creating project timelines and managing research project tasks.
4. Stakeholder Engagement:
 - Evidence of basic oral and written communication skills for engaging with diverse audiences.

²¹ [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

- Demonstrated understanding of the potential impact of research on communities and vice versa.
5. Line Management and Talent Development:
 - Able to identify common sources of conflict within a team and make suggestions regarding resolution.
 - Ability to monitor and report on basic performance metrics.
 - Demonstrates knowledge of the foundational concepts of team building and its importance to the research agenda of the organisation.
 6. Communication Skills:
 - Shows potential in ability to network and initiate and sustain professional relationships.
 - Clear understanding of the research landscape inclusive of funding and collaborations
 7. Subject Matter Expertise/Specialised Knowledge:
 - Has a knowledge of [specific sub-type research management roles].
 - Clear evidence of ability to apply [specialized knowledge] to enhance research project outcomes and organizational impact.
 - Understands basic [specialized knowledge] requirements and their implications for the development of the research project

Essential Criteria:

1. Bachelor's degree in a relevant field (e.g., science, business, or research management) or equivalent professional experience.
2. Demonstrated ability to assist with strategic planning analyses using tools such as SWOT analysis.
3. Proficiency in basic data collection techniques such as surveys, interviews, and observations.
4. Experience in creating data visualizations, including bar charts, histograms, and scatter plots.
5. Understanding of project management principles within a research context.
6. Evidence of skills in creating project timelines and managing research project tasks.
7. Proven capability to identify tasks, prioritize them, and develop an efficient work schedule.
8. Strong oral and written communication skills for engaging with diverse audiences.
9. Understanding of the impact of research on communities and vice versa.
10. Basic understanding of research and business operations.

Job Description: Research Manager 2 (RM 2)

Position Overview: The term Recognised Research Manager refers to research managers with an intermediate level of experience in their research management activity whilst demonstrating competencies and skills for the successful performance in the role. The role requires a moderate understanding of overall research/business operations including responsibility for monitoring the implementation of research strategy. This has limited or informal responsibility for colleagues and / or needs to consider broader approaches or consequences through own actions rather than through others. Please refer to European Competence Framework for Research Managers²² for learning outcomes under proficiency level “intermediate”.

What you will bring to the role:

1. Cognitive Abilities/Personal Attributes:

- Demonstrated ability to problem solve using methodologies and or procedures to enhance and nuance the solution.
- Always considers diverse perspectives when evaluating information to formulate decisions and consequences of these decisions.
- Demonstrates the ability to navigate and communicate effectively in diverse cultural contexts, displaying awareness, respect, and adaptability towards varying cultural norms and practices.
- Able to use networking contacts and colleagues to discuss, address and resolve problems.

2. Technical Proficiency:

- Ability to develop structured instruments for data collection, such as surveys and questionnaires.
- Experience in managing and organising data using databases, ensuring data integrity and security
- Proven ability to analyse and draft complex contracts.

3. Research Project Oversight:

- Can develop and refine project plans, including detailed task lists, resource allocation, and risk assessments.
- Ability to track and administer project budgets, including expenses, forecasting, and financial reporting.
- Able to communicate progress and challenges effectively with research team members and stakeholders.

²² [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

- Track record of allocating resources effectively, considering personnel, equipment, travel and budget constraints.
4. Stakeholder Engagement:
- Plans and coordinates intermediate-level research outreach events, such as workshops, webinars, or seminars
 - Evidence of productive engagement with relevant research associations, including attending conferences and networking events.
 - Clear ability to negotiate with and address the interests of a multitude of stakeholders.
5. Line Management and Talent Development:
- Sound knowledge of roles and responsibilities within the research team and clarifies same for better coordination.
 - Evidence of ability to develop skills in strategic talent mapping for research teams and projects.
 - Ability to identify and nurture individuals with the potential for leadership roles in research and research management.
6. Communication Skills:
- Evidence of ability to discuss and negotiate agreements with stakeholders.
 - Ability to craft strategic communication plans aligned with research objectives.
 - Can create and adapt key messages for effective communication with the media.
 - Sound knowledge of citation and referencing techniques for accuracy and credibility.
7. Subject Matter Expertise/Specialised Knowledge:
- Has a keen knowledge of [specific sub-type research management roles].
 - Clear track record of ability to apply [specialized knowledge] to enhance research project outcomes and organizational impact.
 - Understands [specialized knowledge] requirements and their implications for the development of the research project.

Essential Criteria:

- 1.** Bachelor's and or a master's degree in a relevant field (e.g., science, business, or research management) *or equivalent professional experience*.
- 2.** Demonstrated ability to problem solve using methodologies and procedures to enhance solutions.
- 3.** Ability to consider diverse perspectives when evaluating information and making decisions.
- 4.** Proven capability to navigate and communicate effectively in diverse cultural contexts.
- 5.** Ability to develop structured instruments for data collection, such as surveys and questionnaires.
- 6.** Experience in managing and organizing data using databases, ensuring data integrity and security.
- 7.** Proven ability to analyse and draft complex contracts.
- 8.** Ability to develop and refine project plans, including detailed task lists, resource allocation, and risk assessments.
- 9.** Experience in tracking and administering project budgets, including expenses, forecasting, and financial reporting.
- 10.** Proven ability to communicate progress and challenges effectively with research team members and stakeholders.
- 11.** Experience in planning and coordinating intermediate-level research outreach events, such as workshops, webinars, or seminars.
- 12.** Evidence of productive engagement with relevant research associations, including attending conferences and networking events.
- 13.** Ability to negotiate with and address the interests of multiple stakeholders.
- 14.** Sound knowledge of roles and responsibilities within the research team for better coordination.
- 15.** Evidence of ability to develop skills in strategic talent mapping for research teams and projects.

Job Description: Research Manager 3 (RM 3)

Position Overview: The term Established Research Manager refers to research managers with an advanced level of experience in their research management activity whilst demonstrating competencies and skills for the successful performance in the role. The role requires strong understanding of the organisation's environment, operational plans, current strategic position and direction with strong analytical skills and the ability to advise on strategic options for the research/business. This may include formal responsibility for colleagues and their actions; and that their decisions have a wider impact. Please refer to European Competence Framework for Research Managers²³ for learning outcomes under proficiency level "advanced".

What you will bring to the role:

1. Cognitive Abilities/Personal Attributes:

- Demonstrated ability to cultivate a culture of solution-oriented thinking by fostering creativity within research teams and/or the organisation.
- Track record of introducing new or improved methodology, policy, or practice to enhance research progress and problem solve.
- Always regards and provides evidence of consideration of the long-term consequences of decisions made bearing in mind potential legacy issues.
- Provides evidence of consideration of ethical issues at an advanced level in critical decision-making.
- Exhibits a track record of seamlessly navigating diverse cultural environments, fostering inclusive interactions, and contributing positively to cross-cultural collaborations with a high degree of cultural awareness and empathy.

2. Technical Proficiency:

- Ability to conduct advanced statistical analyses of complex linked data.
- Experienced with integrating and analysing data from various sources, including qualitative and quantitative data.
- Ability to draft complex contracts and or legal pleadings.
- Ability to work with AI experts and teams to integrate AI effectively.

3. Research Project Oversight:

- Clear evidence of ability to identify, assess, and manage risks proactively, implementing strategies to mitigate potential issues.

²³ [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

- Ability to effectively navigate and manage changes in project scope, timeline, or objectives, ensuring minimal disruption.
- Adept at providing guidance to senior management on strategic opportunities, project and portfolio design, and risk management for large-scale projects and portfolios.
- Ability to identify and proactively address potential risks that could impact the achievement of deliverables.
- Evidence of assisting with the development of a detailed and accurate budget, considering all project costs and funding sources.

4. Stakeholder Engagement:

- Knowledge of and ability to implement metrics and assessment strategies to measure the impact of research outreach activities.
- Evidence of leading the development of strategic partnerships with the academic community.
- Is aware of and engages with policy trends and frameworks concerning community engagement and research impact more broadly.
- Sound ability to implement complex communication strategies tailored to diverse stakeholder needs.

5. Line Management and Talent Development:

- Ability to anticipate and plan for future challenges within the team.
- Always aligns team goals with that of the organisation.
- Able to address and resolve complex issues within the research team.
- Evidence of providing leadership in executing and overseeing change initiatives.
- Adept at conducting in-depth assessments, providing nuanced feedback that inspires self-reflection and meaningful change.
- Evidence of developing strategies for succession planning in research teams and within the organisation.

6. Communication Skills:

- Evidence of ability to resolve conflicts and negotiate agreements with research partners and funders.
- Ability to craft integrated communication strategies that align with overall organisational goals.
- Can create and foster long-term relationships through open and transparent communication practices.

- Clear ability to synthesize complex information clearly and accurately in reports.
7. Subject Matter Expertise/Specialised Knowledge:
- Has an advanced knowledge of [specific sub-type research management roles].
 - Clear track record of ability to apply [specialized knowledge] to enhance research project outcomes and organizational impact.
 - Deep understanding of [specialized knowledge] requirements and their implications for the development of the research project.
 - Ability to prepare and present comprehensive [specialized knowledge] reports to senior management and funding agencies.
 - Ability to use developed negotiation skills to address complex issues in [specialized knowledge] agreements and contracts.

Essential Criteria:

1. Bachelor's and or a master's degree in a relevant field (e.g., science, business, or research management) *or equivalent professional experience*.
2. Demonstrated ability to cultivate a culture of solution-oriented thinking by fostering creativity within research teams and/or the organisation.
3. Evidence of considering long-term consequences and potential legacy issues in decision-making.
4. Proven track record of introducing new or improved methodologies, policies, or practices to enhance research progress and problem-solving.
5. Experience in integrating and analysing data from various sources, including qualitative and quantitative data.
6. Proven ability to draft complex contracts and legal pleadings.
7. Ability to identify, assess, and manage risks proactively, implementing strategies to mitigate potential issues.
8. Proven ability to provide guidance to senior management on strategic opportunities, project and portfolio design, and risk management.
9. Evidence of leading the development of strategic partnerships with the academic community.
10. Ability to implement complex communication strategies tailored to diverse stakeholder needs.
11. Proven ability to align team goals with organizational goals.
12. Experience in addressing and resolving complex issues within the research team.
13. Evidence of providing leadership in executing and overseeing change initiatives.
14. Ability to conduct in-depth assessments and provide nuanced feedback that inspires self-reflection and meaningful change.
15. Evidence of developing strategies for succession planning in research teams and within the organisation.

Job Description: Research Manager 4 (RM 4)

Position Overview: The term Senior Research Manager refers to research managers with an expert level of experience in their research management activity whilst demonstrating the competencies and skills for successful performance in the role. The role requires expert knowledge to develop strategic vision and provide unique insight to the overall direction and success of the research/organisation. This includes formal responsibility for research/business areas and his / her actions and decisions have a high-level strategic impact. Please refer to European Competence Framework for Research Managers²⁴ for learning outcomes under proficiency level “expert”.

What you will bring to the role:

1. Cognitive Abilities/Personal Attributes:

- Demonstrated ability to provide leadership and facilitate creative problem solving at team, organisational and national/international level.
- Track record of consistently demonstrating creativity in evaluating complex problems and generating innovative solutions.
- Ability to design and execute comprehensive strategies to inform organisational decision making.
- Evidence of generating innovative solutions through systematically evaluating complex problems, synthesizing diverse information and contributing to advanced decision-making processes.
- Exhibits a track record of developing and implementing policy and practice that addresses and solves problems at the organisational, national and or international level.
- Ability to integrate insight, analyse global trends, and anticipate emerging challenges in the creation of agile and adaptive strategic plans.
- Track record of astute judgment to consistently achieve positive results and strategic objectives for the organisation.

2. Technical Proficiency:

- Ability to apply advanced analytical techniques to large datasets, utilising tools like machine learning and artificial intelligence.
- Experienced in introducing innovative techniques and methodologies, contributing to advancements in the field of expertise.
- Ability to contribute to the publication of research findings, effectively communicating methodologies and results.

²⁴ [RM Comp: The European Competence Framework for Research Managers - European Commission](#)

- Track record of managing and optimising IT infrastructure for large-scale research projects.
- Experience of working with AI experts to develop comprehensive policies and ethical guidelines for AI use, ensuring responsible and fair AI practices.
- Leadership experience in the integration of AI in research management, sharing knowledge through industry forums, publications, and workshops.

3. Research Project Oversight:

- Clear evidence of providing leadership within project teams, fostering a collaborative and innovative project culture.
- Ability to effectively manage a portfolio of research projects, optimising resource allocation and project synergies.
- Adept at providing implementing continuous improvement strategies, incorporating lessons learned from previous projects into current practices.
- Expertly contribute strategically to the development of deliverables, ensuring they contribute to broader research and organisational goals.
- Evidence of clear ability to select and refine performance indicators and apply sophisticated methodologies to assess the effectiveness, efficiency, and impact of these indicators.
- Ability to manage complex resource allocations, including human, financial, and technical resources.

4. Stakeholder Engagement:

- Evidence of ability to develop and implement outreach strategies at the organisational level, considering cultural nuances and international contexts.
- Evidence of establishing and leading collaborative networks involving academia, research associations and research communities.
- Evidence of the ability to strategically cultivate and sustain robust collaborations, leveraging extensive networks to foster interdisciplinary research initiatives, secure grant funding, and facilitate knowledge exchange.
- Sound ability to lead complex engagements involving multiple variables, methodologies, and data sources.

5. Line Management and Talent Development:

- Ability to develop and lead collaborative strategies for teams working across multi-partner projects within multinational contexts.

- Experienced in leading collaborative initiatives that bring together diverse stakeholders for impactful research within common goals.
- Able to develop and implement strategies that address complex changes within the research ecosystem.
- Evidence of providing leadership in executing and overseeing change initiatives.
- Demonstrates advanced proficiency in analyzing complex organisational dynamics, identifying potential challenges, and designing tailored interventions to address resistance effectively.
- Evidence of ability to design and execute talent management strategies for researchers and research managers within the organisation.
- Experienced contributor to building the overall research capacity of the organisation through the identification of key skills and targeted training initiatives.
- Evidence of a sophisticated understanding of diverse research skill sets and potential at the individual and organisational level.

6. Communication Skills:

- Evidence of ability to develop and implement strategies for managing relationships and collaborations on a national and international level.
- Clear track record of an unparalleled ability to navigate complex dynamics and foster long-term collaborations.
- Can and has designed and executed communication strategies that drive research impact.
- Evidence of developing and implementing strategies for managing overall organisational research communication on a national and international level.

7. Subject Matter Expertise/Specialised Knowledge:

- Leads the development and implementation of innovative approaches to [specific subject matter expertise].
- Builds and manages strategic partnerships with key stakeholders and organisations to facilitate [specialized knowledge] to enhance research project outcomes and organizational impact.
- Provides expert guidance in research project management and leads the development and implementation of [specialized knowledge].
- Experienced in overseeing multi-institutional or multi-disciplinary research projects with diverse funding sources, influences research policies and standards at institutional, national, or international levels as it pertains to [specialized knowledge].

- Ability to lead and/or represent the organisation in discussions with funding agencies, government bodies, industry partners and other relevant stakeholders as it pertains to [specialized knowledge].
- Track record of contributing to the development of institutional and national policies related to [specialized knowledge].

Essential Criteria:

1. Bachelor's and or a master's degree and or a PhD in a relevant field (e.g., science, business, or research management) *or equivalent professional experience*.
2. Demonstrated ability to provide leadership and facilitate creative problem-solving at team, organizational, and national/international levels.
3. Proven track record of consistently demonstrating creativity in evaluating complex problems and generating innovative solutions.
4. Ability to integrate insights, analyse global trends, and anticipate emerging challenges in strategic planning.
5. Ability to apply advanced analytical techniques to large datasets, utilizing tools like machine learning and artificial intelligence.
6. Experience in introducing innovative techniques and methodologies, contributing to advancements in the field.
7. Evidence of providing leadership within project teams, fostering a collaborative and innovative project culture.
8. Ability to manage a portfolio of research projects, optimizing resource allocation and project synergies.
9. Experience in implementing continuous improvement strategies and incorporating lessons learned from previous projects.
10. Experience in managing complex resource allocations, including human, financial, and technical resources.
11. Evidence of establishing and leading collaborative networks involving academia, research associations, and research communities.
12. Proven ability to cultivate and sustain robust collaborations, leveraging extensive networks for interdisciplinary research initiatives.
13. Experience in leading complex engagements involving multiple variables, methodologies, and data sources.
14. Ability to develop and implement strategies that address complex changes within the research ecosystem.
15. Evidence of providing leadership in executing and overseeing change initiatives.
16. Experience in designing and executing talent management strategies for researchers and research managers.

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Acknowledgement

This document was prepared with the assistance of AI tools, (Microsoft Copilot and Chat GPT), which supported drafting, editing, and formatting.