

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



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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 Managers¹ 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.

¹ [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 Managers² 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.

² [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 Managers³ 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.

³ [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 Managers⁴ 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.

⁴ [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.

Appendix B

Proposed Charter for Research Managers



(Proposed) European Charter for Research Managers

The European Charter for Research Managers is a set of principles designed to establish and promote the development of professional and rewarding careers in research management, thereby supporting excellence in research and innovation across the European Research Area (ERA). This charter aligns with existing frameworks, namely the European Charter for Researchers, but it explicitly focuses on the rights and responsibilities of research managers (RM), employers, funders, and policymakers. It consists of 26 key principles.

Basic Principle: RMs play a crucial role in supporting the performance and impact of research activities across institutions. This charter establishes principles and guidelines to enhance research management through recognition, development, and effectiveness as a critical professional role within the ERA, in direct correlation with the researchers' role. The RM Charter is a text of reference to reinforce the activity of RMs in research organisations and companies to support and improve research performance. The best research necessarily requires the best support, which means excellent RMs, in a common framework following the continuously evolving research context.

Purpose and Scope of the Charter: This charter provides a framework to support and promote the visibility of RMs' positive role within the European research ecosystem. It aims to outline RMs' rights, responsibilities, and professional development opportunities while also detailing the responsibilities of employers, funders, and policymakers in fostering a collaborative, innovative, and effective research environment. This charter is necessary to increase the capacity for professional excellence in research management and to improve the overall ERA.

Definition of RMs:

It is important to define what the term RM means. RM is an umbrella term “which encompasses a wide range of research management roles and specialisations at the “interface of research”⁵ under a single classification. It groups together multiple research management roles/activities and specialised subject matter experts who share common role objectives and competencies within public and private sector research-performing organisations.

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.”***

Based on the policy contexts, the results of recent investigations, and a Europe-wide co-creation in the frame of ERA Action 17 and RM Roadmap, we initiate an inclusive and flexible approach enabling the reflection of emerging fields and job profiles when defining Research Management. Thus, RMs 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 support offices, etc.

Importance of Research Management in the Research Ecosystem: Research management is vital to the sustainability and growth of the European research ecosystem. Effective RMs ensure that research is conducted efficiently within known and explicitly assumed ethical boundaries and in line with strategic objectives. They support researchers in navigating complex administrative, financial, and regulatory landscapes, enhancing the overall quality and impact of research outcomes.

The European Charter for RMs consists of key principles grouped under the following six pillars:

- (a) **Ethics, Integrity, and Professional Standards**
- (b) **Rights, Responsibilities, and Accountability**
- (c) **Professional Development and Career Progression**
- (d) **Collaboration, Networking, and Mobility**
- (e) **Working Conditions and Work-Life Balance**
- (f) **Recruitment and Recognition**

The Charter for RMs is directed at all RMs, research performing/management sectors, and their respective umbrella organisations (stakeholders). This includes:

- a) **RMs in all sectors** – academia, public, and private organisations performing /conducting/ research activities;
- b) **Employers of RMs** in the public and private sectors;
- c) **Research and RM funding entities** in the public and private sectors.
- d) **Policymakers** concerned with policies relevant to the Charter for RMs.

⁵ Margarida Trindade - Head of ITQB NOVA Science Funding Office

In line with the Charter for Researchers, it comprises RMs across all disciplines, including Science, Technology, Engineering, Mathematics (STEM), and Social Sciences and Humanities (SSH). It covers all types of research, from frontier to targeted, strategic, applied, and close to market.

Pillar 1: Ethics, Integrity, and Professional Standards

- 1. Professionalism and Integrity**
- 2. Upholding Ethical Standards**
- 3. Conflict of Interest**
- 4. Compliance with Regulations**
- 5. Gender, Equality and Diversity**

This pillar encompasses the core principles of the Charter for RMs and the commitment to advancing the highest ethical standards and integrity in research and inclusive research environments. In this context, it focuses on developing the best possible research management practices, creating teams and projects free from gender bias and other forms of discrimination, ensuring equal opportunities, and fostering an inclusive culture. The principles under this pillar are designed to build a solid foundation for a vibrant ERA, inspiring RMs, employers, funders, and policymakers to uphold the highest standards of integrity, transparency, and fairness. Given the cross-cutting nature of these values, they are intended to be integrated and upheld throughout all other principles of the Charter, ensuring they are reflected in every aspect of research management practices.

1. Professionalism and Integrity

RMs are tasked with a demanding role that requires them to apply advanced analytical techniques, compliance, and ethical considerations to all research activities. They are expected to uphold the highest standards of professionalism and integrity, nurturing a culture of transparency and accountability across all aspects of their roles.

2. Upholding Ethical Standards

RMs are responsible for upholding the highest ethical standards and promoting fairness, integrity, and respect for all parties involved in the research process. This consists of managing and disclosing conflicts of interest, navigating complex research environments, and ensuring compliance with ethical guidelines, professional codes and institutional policies.

3. Conflict of Interest

RMs should develop and implement strategies for identifying, managing, and disclosing conflicts of interest, ensuring impartiality and fairness in all decisions and actions. This includes understanding the legal implications and maintaining a transparent conflict resolution process. RMs need to ensure impartiality and fairness. All stakeholders need to define and manage potential conflicts of interest.

4. Compliance with Regulations

RMs must be proficient in applying relevant national and international laws and regulations. They should also promote adherence to these regulations within their teams, leveraging their legal skills to ensure all research activities meet compliance standards. All stakeholders should strive to ensure professional, research and academic integrity with the largest associated coverage for their terms of reference.

5. Open Science

RMs should support the Open Science principles by promoting transparency, accessibility, and reproducibility in research management practices. This includes encouraging open access to publications, FAIR data principles (Findable, Accessible, Interoperable, Reusable), and fostering an open collaboration culture within their institutions, to the highest possible extent in the local research context

6. Gender Equality and Diversity

RMs, employers, and funders are jointly responsible for fostering gender equality and diversity. This includes implementing inclusive recruitment and promotion practices, ensuring gender balance in decision-making, and integrating gender perspectives into all aspects of research management. They must combat gender-based discrimination and harassment through clear policies, training, and accountability while creating a welcoming and equitable workplace for all.

Pillar 2: Rights, Responsibilities, and Accountability

- 7. Rights Of RMs**
- 8. Responsibilities of RMs**
- 9. Clear Definition of roles and Responsibilities**
- 10. Accountability and Transparent Decision-Making**
- 11. Freedom to Innovate**
- 12. Support for Mobility**

This pillar establishes RMs' essential rights and responsibilities, emphasising their role in fostering an inclusive, supportive, and innovative research environment. It underlines the need for a clear definition of roles and responsibilities, transparent decision-making, and freedom to innovate. These principles aim to empower RMs by ensuring they have the necessary support and resources to lead their teams and contribute to the research ecosystem effectively. Given their fundamental importance, these principles are expected to guide the development and implementation of all other aspects of research management.

7. Rights of Research Managers

Supportive and Inclusive Work Environment: RMs have the right to a work environment that is inclusive, supportive, and free from discrimination. This includes being involved in decision-making processes and accessing mental and physical well-being programs (e.g., policies on diversity and inclusion, mental health support, opportunities for cross-functional collaboration).

Raising Awareness and Valuing the Role of RMs: Employers, funders, and policymakers should actively raise awareness about RMs' critical role in supporting research excellence and innovation. They should promote the value of research management through internal and external communication channels, recognising their strategic contributions in planning, compliance, funding acquisition, project execution, and stakeholder engagement. Employers should develop and maintain a supportive research environment and a working culture where all the actors involved in the research cycle (researchers R1 to R4, senior and junior research managers) are valued, encouraged and supported. This also implies that employers should recognise the role of research managers (other than that of the rest of the administrative and technical staff) and valorise them regarding career recognition and valorisation. Employers should also take adequate measures to raise awareness among the research community and stakeholders of the role and added value that RM can give to the institution and its local ecosystem and foster collaboration between researchers and researcher managers.

Access to Professional Development: RMs should have opportunities for continuous professional development, including training in specialised areas such as data management, research ethics, and AI for research. The European Charter for Researchers states that researchers should have access to continuous professional development, lifelong learning, and career progression pathways; RMs should have the same provisions in their professional development.

Provision of Adequate Resources and Support: Employers and funders are encouraged to provide employees with adequate resources and support tools to perform their roles effectively. This includes access to appropriate technology, including communication technology, sufficient staffing levels, training budgets, professional development opportunities, and dedicated funding from well-defined channels, not overlapping/impacting the research funding.

8. Responsibilities of Research Managers

Promotion of a Culture of Excellence and Innovation: RMs are responsible for nurturing a culture of excellence and innovation, supporting themselves as individuals and their teams in developing competencies across diverse areas such as research project management, community engagement, and strategic planning. Employers and funders should provide the resources, support, and infrastructure necessary to enable innovation, including access to training, development opportunities, and a collaborative environment that encourages creativity and strategic thinking. They should create an ecosystem where innovative practices are recognised, rewarded, and continuously cultivated to enable RM excellence.

9. Clear Definition of roles and Responsibilities

RMs, employers, and funders are jointly responsible for defining roles and responsibilities and implementing these standards. Frameworks like the CARDEA Framework Profile for RMs and RM Comp can be used to define roles clearly and ensure transparency in decision-making processes.

As with the European Framework for Research Careers⁶ in the CARDEA Framework Profile for RMs, there are four broad profiles for RMs, which are independent of any particular sector with the following working titles:

First Stage Research Manager (RM 1)

The term First-Stage RM refers to RMs in the first two years (full-time equivalent) of their research management activity, often interwoven with intricate research tasks, who demonstrate the competencies and skills for successful performance in the role. The role requires a basic understanding of the research/business structures and operations and includes responsibility for implementing and achieving results.

Recognised Research Manager (RM 2)

The term Recognised Research Manager refers to RMs 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

⁶ Towards a European Framework for Research Careers
[towards a european framework for research careers final.pdf \(europa.eu\)](https://europa.eu/european-council/en/towards-a-european-framework-for-research-careers-final.pdf)

limited or informal responsibility for colleagues and / or needs to consider broader approaches or consequences through own actions rather than through others.

Established Research Manager (RM 3)

The term Established RM refers to RMs 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 a 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 includes formal responsibility for colleagues, institutional partners in and their actions; and that their decisions have a wider impact.

Senior Research Manager (RM 4)

The term Senior Research Manager refers to RMs 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 is 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 RMs and RM 3 and RM 4 profiles should be considered leadership level RMs.

The RM Comp Framework identifies eight core competency areas critical to research management: Cognitive Abilities/Transversal Skills, Technical Proficiency, Subject Matter Expertise, Research Project Oversight/Management, Community Engagement, Line Management and Talent Development, Communication, and Relationship Management. Each competency area includes specific skills required for effective performance in research management roles.

As this conceptual model is in line with other competence frameworks developed by the European Commission, particularly [Research Comp](#), it follows a similar structure, including four levels of proficiency for each of the 53 competences that specify where RMs can position themselves and what is required to progress to the next level:

- **Foundational:** developing expertise with guidance;
- **Intermediate:** building independence;
- **Advanced:** taking responsibility and guiding others;
- **Expert:** driving transformation, innovation and growth.

Develop Professional Development Pathways: This pathway provides a pathway for RMs to progress through various levels of proficiency, from foundational to expert. This should include development opportunities such as targeted training, mentorship, job shadowing, and peer-to-peer learning to enhance competencies in specific areas.

Support Performance Management and Evaluation: Establish clear criteria for assessing the performance of RMs at each proficiency level. Learning outcomes are provided for each competency, which can be used to set goals, measure progress, and identify areas for further development.

For example, based on RM Comp:

Cognitive Abilities/Transversal Skills: Assess creativity, critical thinking, and problem-solving abilities.

Technical Proficiency: Evaluate skills in data management, legal and regulatory field-related knowledge, and IT for research activities.

Line Management and Talent Development: Measure effectiveness in team performance, change management, and coaching skills.

Facilitate Cross-Organisational Mobility: Employers and funders should follow the framework, which facilitates the mobility of RMs across institutions, sectors, and countries by offering a standardised competency framework. The framework encourages a common language for describing skills and competencies, making it easier for RMs to transition between roles and organisations.

Encourage Continuous Learning and Adaptation: Encourage RMs to engage in continuous professional development. It includes a progression model that outlines specific learning outcomes and competencies for each level, enabling managers to self-assess and plan their growth. This model supports vertical progression (advancing to a higher level) and horizontal mobility (specialising in a different area of research management).

Promote Recognition of Diverse Career Paths: The framework acknowledges that career progression in research management is not linear. It allows for specialisation in multiple areas, recognising diverse career trajectories, such as moving from post-award management to impact assessment or technology transfer to strategic policy development. This flexibility ensures that RMs are recognised for their unique skills and contributions. Moreover, their career might also include one or more research trajectories.

10. Accountability and Transparent Decision-Making

RMs must establish clear and transparent decision-making processes, maintain accountability, and ensure that all actions are justifiable and open to scrutiny. Employers and funders are responsible for creating an environment that supports accountability and transparency in research management. They should provide frameworks, tools, and resources that enable RMs to make informed decisions and regularly monitor and evaluate these processes. Employers and funders should also promote open communication channels, encourage ethical conduct, and establish systems that facilitate oversight and accountability at all levels.

11. Freedom to Innovate

RMs should have the freedom to innovate in their management practices to enhance the effectiveness and impact of research projects. They should be empowered to implement new methodologies, tools, and frameworks that best support the research teams they manage. Employers and funders are responsible for creating an environment that encourages innovation in research management. This includes providing the necessary resources, flexibility, and support for RMs to experiment with novel approaches and adopt innovative practices. Employers and funders should recognise and reward innovative and effective management practices, promote a culture that values creativity, and remove barriers that may hinder the implementation of creative ideas.

12. Support for Mobility

RMs, employers, funders, and policymakers should encourage geographical, disciplinary, inter-sectoral, and inter-organisational mobility for RMs. The institutional environment of RMs should provide opportunities for mobility or exchanges for short periods to allow discussion, training and networking to upskill their competencies. RMs need to connect and network with external colleagues and researchers of institutions and industries to create and maintain channels to learn, upskill and support in an environment of open science and innovation, with an *inter-pares* approach.

Promote mobility programs and exchanges to enhance professional development and exchange best practices across Europe. Employers and funders should encourage collaboration and knowledge sharing among RMs within and across institutions to foster innovation and best practices.

This can include:

- **Mobility Programs:** Supporting mobility programs that enable RMs to work across different institutions, sectors, or countries. Such programs could be short-term secondments, exchanges, or fellowships promoting knowledge and skills transfer.
- **Networking Opportunities:** Facilitating participation in professional networks, conferences, and forums where RMs can share experiences, learn from peers, and build valuable connections.
- **Cross-Institutional Collaborations:** Encouraging and funding cross-institutional collaborations, joint projects, and research management initiatives to promote knowledge exchange and collaborative problem-solving.
- **Building partnerships** with other institutions and industries
- **Participation in international research networks**

Pillar 3: Professional Development and Career Progression

- | |
|---|
| <ul style="list-style-type: none">13. Training and Development14. Career Progression15. Fair Assessment and Recognition16. Management, Supervision and Mentoring |
|---|

This pillar advances RMs' continuous growth and advancement through structured professional development and clear career pathways. It highlights the importance of ongoing training, mentorship, and fair recognition of diverse career trajectories. The principles under this pillar aim to support a dynamic and skilled workforce that is well-equipped to meet the evolving demands of research management. As a cornerstone of the charter, these principles support a lifelong learning and adaptability culture, which is integral to the ERA's success.

13. Training and Development

RMs should have access to training programs that develop core competencies identified in the RM Comp framework, such as cognitive abilities, soft skills, technical proficiency, subject matter expertise, and more.

Institutions should adopt a culture of lifelong learning, encouraging RMs to pursue continuous professional development through various channels, such as workshops, conferences, mentoring, e-

learning, and access to accredited training, in a similar manner researchers adopt by default professional development in the specific research context

14. Career Progression

Clear Pathways for Career Advancement: Establish clear pathways for career progression aligned with the four proficiency levels outlined in RM Comp and the Career Progression Framework.

RM1: First Stage RM	
	Foundational
RM2: Recognised RM	
	Intermediate
RM3: Established RM	
	Advanced
RM4: Senior Stage RM	
	Expert

Recognition of Diverse Career Trajectories: Employers, funders and policymakers should acknowledge and value diverse career paths, including vertical advancement and horizontal specialisation across various research management areas. This acknowledgement should be considered through fair assessment and recognition procedures and in recruitment processes, and should be made open for the entire research community within the institution.

15. Fair Assessment and Recognition

RMs have the right to be evaluated based on the results of their work, individual or collective, produced in their offices or institutions. At the same time, research evaluation of institutions should include the evaluation of management and support.

The development of fair assessment and recognition procedures for RMs should reflect the diversity of their contributions, including leadership, team management, strategic planning, and community engagement. Therefore, we must ensure that the assessment is based on qualitative evaluations supported by using quantitative indicators.

Recognition and Reward of Effective Research Management (RM1 to RM4)

Employers and funders should establish systems to recognise and reward effective research management at all levels (from RM1 to RM4). This may include:

- **Awards and Honors:** Creating awards or honours for RMs to recognise excellence in project management, strategic planning, compliance, and innovation.
- **Promotion Pathways:** Providing clear pathways for promotion within the research management career structure, acknowledging diverse contributions and skills at each level.
- **Financial Incentives:** Offering financial incentives such as performance bonuses, salary increments, or grants for continuing education to reward exceptional performance.
- **Professional Recognition Programs:** Supporting professional recognition programs that highlight the achievements of RMs, both within the institution and at national or international levels.
- Acknowledge and value diverse career paths, including vertical advancement and horizontal specialisation across various research management areas.

16. Management, Supervision and Mentoring

Adequate supervision and mentoring in research management should be considered, including training in people management, conflict resolution, and leadership skills. Senior RMs should mentor junior colleagues and foster a positive and inclusive team environment.

Pillar 4: Collaboration, Networking, and Mobility

17. Internal Collaboration

18. External Collaboration and Networking

19. Public Engagement

20. Promoting Innovation

21. Measuring Impact

22. Sustainability in Research Management

This pillar promotes a collaborative research management approach, encouraging internal and external partnerships across disciplines, institutions, and sectors. It emphasises the importance of knowledge sharing, public engagement, and active participation in international networks to advance innovation and best practices. These principles are designed to strengthen the interconnectedness of the European Research Area, ensuring that RMs can effectively navigate and contribute to a complex, multidisciplinary landscape.

17. Internal Collaboration

RMs, researchers, employers and funders should promote a culture of collaboration and teamwork, encouraging interdisciplinary projects and partnerships within their institutions and beyond. As outlined in the RM Comp framework, they should be skilled in community engagement, line management, and relationship management.

Research institutions are complex ecosystems, with several offices of RMs, research teams and individual researchers. The collaboration between different teams and offices must be promoted to explore successful and effective approaches to institutional challenges

18. External Collaboration and Networking

Actively building partnerships with other institutions, industries, and stakeholders (e.g., cross-institutional projects and public-private partnerships) should be encouraged. Engaging in international research networks, promoting the mobility and transferability of RMs across borders, and leveraging competencies in communication, networking, and strategic planning should also be encouraged. RMs can leverage European networks or programs to promote mobility and knowledge exchange.

The local, national, and international communities of RMs have the right to meet to discuss the challenges of their professional activities, benchmark, and share problems and solutions.

19. Public Engagement

All stakeholders should encourage RMs to facilitate public engagement by promoting open communication of research activities and their impact on society. RMs should support initiatives that make research understandable and accessible to non-specialists and involve the public in co-creation and citizen science projects where appropriate.

20. Promoting Innovation

Encourage creativity and innovation in research management by developing an environment that supports strategic planning, problem-solving, and decision-making, as outlined in RM Comp. Support facilitate translating research findings into practical applications and contribute to developing institutional research strategies on equal standing role with that of researchers.

They should:

- Encouraging creative and innovative approaches
- Support the translation of research into practical applications
- Support (including with participation rights) to creation/establishment/ of spin-off[s]

21. Measuring Impact

It is recommended that metrics be developed and used to assess the effectiveness and impact of research management activities beyond the traditional measures that omit RMs' key activities. These outcomes should be regularly reported on to ensure transparency and continuous improvement.

22. Sustainability in Research Management

Encourage RMs to implement sustainable practices in their management activities, aligning with broader initiatives such as the European Green Deal and the Sustainable Development Goals. This includes promoting practices that reduce environmental impact and enhance the sustainability of research projects, and propose research avenues.

Pillar 5: Working Conditions and Work-Life Balance

23. Supportive Policies for Work-Life Balance

24. Stability of Employment

This pillar focuses on creating a supportive work environment that prioritises the well-being and stability of RMs. It advocates for work-life balance policies, such as flexible working arrangements, and calls for stable employment conditions that reduce job precarity. These principles are essential for attracting and retaining talent in research management and fostering a productive and motivated workforce that contributes to the sustainability and growth of the research ecosystem.

23. Supportive Policies for Work-Life Balance

Implement work-life balance policies, such as flexible working arrangements (e.g., remote work options, flexible hours) and well-being initiatives. Encourage RMs to develop stress management, prioritisation, and time management competencies, supporting a healthy work environment, replicating the institutional approach adopted for researchers.

24. Stability of Employment

Employers should provide stable employment conditions, reduce precarity, and support career continuity through targeted career development services and opportunities for skill enhancement (e.g., mentorship programs, career coaching, or skill-building workshops).

Pillar 6: Recruitment and Recognition

25. Open, Transparent, and Merit-Based Recruitment 26. Recognition and Reward
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As with HR Excellence in Research, this pillar underscores the importance of open, transparent, and merit-based recruitment practices that recognise diverse competencies and career paths in research management. It also calls for systems that appropriately recognise and reward the contributions of RMs, from entry-level positions to senior leadership roles. By establishing these standards, the principles under this pillar aim to create an equitable and inclusive environment where all RMs are valued and supported in their professional journeys.

25. Open, Transparent, and Merit-Based Recruitment (OTMR)

Establish recruitment practices that recognise the diverse competencies outlined in RM Comp and the CARDEA Career Framework, valuing professional experience and non-linear career paths (e.g., transitioning from academia to industry and back, moving from research management to policy roles).

26. Recognition and Reward

Develop systems to recognise and reward (e.g., awards, public recognition, bonuses, promotions), effective research management, ensure fair evaluation criteria aligned with the four proficiency levels (RM1 to RM4), and promote career progression, in a strong correlation with the institutional approach for researchers' rewarding schemes

Conclusion

This charter integrates the RM Comp framework to provide a structured, competency-based approach to RMs' rights, responsibilities, and professional development.

Call to Action for Adoption and Implementation

All research institutions, employers, and funders are encouraged to adopt and implement this charter, recognising research management as a critical profession (e.g., conducting audits of current practices, setting up task forces to promote these principles, etc.) In addition, the charter should be considered in the HRS4S assessment.

Vision for the Future of Research Management in Europe

Envision a future where RMs are fully integrated into the research ecosystem, recognised for their contributions, and provided with the resources and support necessary to excel.

Appendix C

Self-Assessment Tool

There are 7 main competence areas in the Research Manager Competence Framework. For each main competence, the self-assessment tool requires you to rate your knowledge, skills, and abilities, indicate if this is an area for your professional development, and indicate when you would like to address this learning need. To establish the benchmarks for adequate knowledge and skill in each competency, it is recommended that you actively seek feedback from mentors and colleagues and review the learning outcomes as outlined in the CARDEA competency framework.

1. Rate your knowledge, skills and ability using the following rating scale:

Knowledge, Skills, and Ability Rating Scale					
N/A	0	1	2	3	4
Not applicable	I have no knowledge/skill in this competency	I have foundational knowledge/skills in this competency.	I have intermediate knowledge/skills in this competency	I have advanced knowledge/skills in this competency.	I have expert knowledge/skills in this competency.

2. Indicate if this is an area for your professional development.

3. Indicate when this will be addressed.

Establishing a timeline for professional development assists in **prioritizing** and managing your learning requirements. You can employ broad timelines like '*Short*,' '*Medium*,' and '*Long-term*' to distinguish goals or incorporate specific dates, such as December 2025 or a three-month timeframe.

4. Offer an example illustrating how you incorporate these competencies into your professional activities.

Engaging in reflective practice fosters professional development by helping you understand acquired knowledge and your professional evolution as a research manager. It also enhances your capacity for critical analysis, enabling a deeper understanding of how you apply the core competencies in your role.

5. Using the Self-Assessment Tool

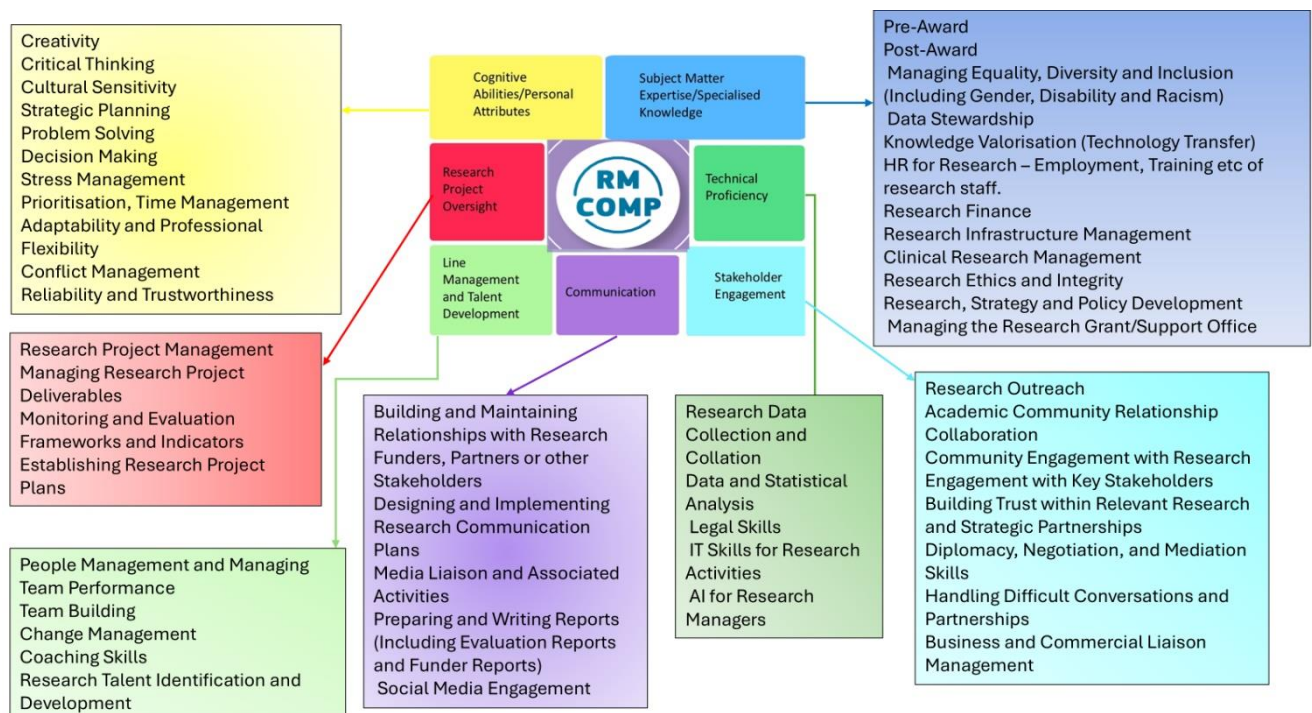
Personalise this self-assessment tool to align with your individual Research Manager role. The CARDEA Framework allows you to incorporate specific, relevant content to tailor the tool to your situation, which may be unique to your area or organisation.

6. The Training Needs Analysis

Use the Training Needs Analysis to create a summary of the specific area(s) in which you intend to concentrate on your current training needs. Specify the training you need within each identified area, such as social media, communication, project management, ethics, and so forth.

7. The Professional Development Plan

The professional development plan template helps outline **HOW** you will develop the identified skill and/or competency.



The following section will begin by assessing your cognitive abilities. Using the instructions above, fill in each section, rating your Knowledge, Skills, and Abilities. Once completed, indicate if this area requires professional development and identify a subsequent timeline for improvement.

Cognitive Abilities/Personal Attributes

Cognitive abilities generally refer to a set of cross-cutting or transferable skills that are applicable across various disciplines, tasks, and situations.

Creativity									
Foster innovative approaches and solutions to aid problem-solving, designing methodologies and/or procedures which encourage a dynamic research environment.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of creativity in research and its critical role in problem solving									
I am able to generate and express new ideas coherently									
I understand the relationship between creativity and risk									
I can analyse information and identify key components to aid creativity									
I challenge my own personal and cognitive biases that would deter creativity									
Critical Thinking									
Able to systematically analyse information, assess the validity of research methodologies and make informed decisions. Identify potential biases, evaluate evidence objectively, and strategically navigate complex research management challenges.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of critical thinking and its significance in decision making									
I can analyse information and identify key components and issues									
I am aware of challenges surrounding personal and cognitive biases in critical thinking									
I can analyse information, identifying logical connections, and making well-reasoned decisions									
I evaluate the credibility and relevance of the information provided									
Cultural Sensitivity									
Awareness and respect for diverse cultural perspectives, values, and norms. Fostering an inclusive work environment, acknowledging the impact of cultural nuances on research design and implementation.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline

I understand the importance of cultural sensitivity in diverse research environments									
I have an awareness of cultural differences, customs and traditions									
I communicate respectfully through all forms of communication									
I exhibit understanding towards individuals from different cultural backgrounds									
I plan and deliver effective cross-cultural communication in all interactions with collaborators, partners, and the team									
Problem Solving									
Develop and implement solutions to practical, operational or conceptual problems which arise in the execution of work in a wide range of contexts.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of concept of problem-solving and its importance in various contexts									
I can recognise and define problems, also using analytical skills to break them down into their component parts									
I understand the principle of collaborating to solve a problem									
I can analyse information, identifying logical connections, and making well-reasoned decisions									
I am open to learning new skills and approaches to identify and analyse issues clearly									
Strategic Planning									
The ability to envision and execute a comprehensive research plan aligned with agreed goals and broader organisational and or national/international strategies									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the fundamental principles of strategic planning and its contribution to the success of a research project									
I can conduct basic strategic planning analyses utilising tools such as SWOT analysis									
I understand how research project objectives align with organisational strategy									

I understand the strategic role of stakeholders, both internal and external to the organisation										
I can identify trends and threats within the research endeavor										
Decision Making										
Effective decision-making in this context is crucial for maintaining project momentum, achieving objectives, and navigating the complexities inherent in the research process.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the fundamental principles in gathering relevant information to inform decision-making										
I use fundamental risk assessment tools to consider potential outcomes of decisions										
I understand the reasoning behind and principles of monitoring decisions and their outcomes										
I understand the basic principle of collaboration when coming to informed decisions										
I can critically analyse complex situations and information										
Stress Management										
Stress management involves developing coping mechanisms and strategies, prioritizing tasks, and maintaining a healthy work-life balance.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I handle unfamiliar and uncomfortable situations with limited facilitation and supervision.										
I persevere and move forward in stressful and pressured situations with limited assistance.										
I am aware of what stress is and how to access further supports and resources to manage my own stress										
I exhibit resilience and the ability to adapt to change in all aspects of the research manager role										
I implement relaxation techniques such as deep breathing, meditation, and mindfulness.										
Prioritisation Time Management and Multitasking										
Involves identifying the most critical tasks and focusing on them first. This skill helps individuals focus on what is most crucial, manage their time and resources efficiently to achieve their goals.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			

About You:	NA	0	1	2	3	4	Yes	No	Timeline
I can identify tasks and prioritise them to develop an individual schedule and perform the work efficiently.									
I work autonomously but actively seek guidance when necessary.									
I can assess personal strengths and weaknesses in time management.									
Adaptability and Professional Flexibility									
Involves adjusting to new situations, technologies, and workflows. Adaptable individuals can thrive in dynamic environments, handle unexpected challenges, and maintain a competitive edge.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I can identify potential risks associated with change and develop mitigation strategies, and am able to ask for clarification during transitions or seek out additional information or resources									
I am aware of changes in my environment, accept them and am ready to make adjustments									
I am committed to continuous learning and professional development in the field of adaptability.									
I understand the basic principle of collaboration when coming to informed decisions									
I can critically analyse complex situations and information									
Conflict Management									
The practice of handling or resolving disputes and disagreements in a constructive manner. It involves identifying and addressing the underlying issues, employing strategies such as negotiation, mediation, and problem-solving to achieve mutually acceptable solutions.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I can identify positive and negative conflicts, learns and practice the skills necessary to resolve conflicts									
I understand the key questioning and listening skills needed to conduct high-quality conversations with members of their team									
I am committed to continuous learning and professional development in the field of adaptability.									
I can critically analyse a range of responses to conflict situations and									

understand the importance of early intervention									
Reliability and Trustfulness									
Involves being dependable and trustworthy in one's work. Reliable individuals consistently deliver high-quality results, meet deadlines, and maintain a strong reputation. It involves demonstrating honesty, integrity, and transparency in actions and communications. Trustfulness is a foundational element in building and maintaining relationships, whether personal or professional.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the basic elements of building trust: reliability, openness, and consistency.									
I have the personal capacity to trust and to generate trust									
I am familiar with ethical standards and guidelines in management, including honesty, integrity, and transparency									
I maintain consistent and thorough documentation of processes, decisions, and communications.									

Technical Proficiency

Technical proficiency refers to the proficiency and expertise in utilising specialised tools, methods, and technologies relevant to the research field/area/organisation. Individuals with technical proficiency can effectively solve complex problems within that technical context.

Research Data Collection and Collation									
Implement (and develop) robust data collection methodologies, coordinate data acquisition efforts among team members, and oversee the organised collation of diverse research datasets leading to evidence-based decision-making.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the fundamental principles of basic data collection techniques such as surveys, interviews, and observations									
I can accurately enter data into spreadsheets or databases									
I understand the basic statistical concepts of describing and summarising data									
I understand the importance of data quality and apply basic data validation and cleaning techniques									
I can manage and organize data using databases, ensuring data integrity and security									
Data and Statical Analysis									

Apply rigorous statistical methods to ensure the accuracy and reliability of data and its interpretation.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the concepts related to data, variables, and datasets									
I can compute and interpret basic descriptive statistics, such as mean, median, mode, and standard deviation									
I create data visualizations, including bar charts, histograms, and scatter plots									
I use statistical software (e.g., R, Python, SPSS) to perform analyses and generate reports									
I apply basic multivariate analysis techniques, such as multiple regression or factor analysis									

Legal Skills

A nuanced understanding of legal concepts, ethical considerations, and a keen awareness of the legal landscape as it pertains to the research ecosystem.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the concept of legal principles and their application									
I understand the principles of contract analysis and interpretation									
I can draft legal documents									
I analyse and draft complex contracts									
I conduct legal due diligence in various situations									

IT for Research Activities

Leveraging Information Technology (IT) and overseeing the integration of advanced technologies to enhance data management, analysis, security and collaboration. Implementation of robust IT infrastructure, such as data storage solutions, analytical tools, AI and collaborative platforms, to optimise research processes.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I am computer literate, including proficiency in operating systems, file management, and software installation									
I organize research data using spreadsheets or database applications									
I conduct complex data analyses using advanced statistical methods and machine learning techniques									

I use collaborative platforms and version control systems for team-based research projects									
I have an acute awareness of cybersecurity best practices to protect research data and systems									
Artificial Intelligence									
Ability to leverage AI technologies and algorithms to optimize research processes, analyse complex datasets, and derive meaningful insights for informed decision-making.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand what AI is and its basic applications in research management.									
I know about basic AI tools and how they can be used in research.									
I recognise ethical concerns related to AI use in research									
I demonstrate a willingness to learn about AI and its integration into research workflows									

Research Project Oversight/Management

Research project oversight refers to the systematic planning, execution, monitoring, and general management of research activities to achieve specific objectives within defined constraints such as time, budget, and scope.

Research Project Management									
Overseeing the entire lifecycle of research projects. Defining objectives, developing timelines, allocating resources including Human Resources, and ensuring the project stays on course. Coordinating diverse aspects of project execution, fostering collaboration, and adapting strategies to overcome challenges.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the principles of project management within a research context									
I understand the processes of initiating a research project, including defining objectives, scope, and stakeholders									
I can create project timelines and manage research project tasks									
I can administer project budgets, including tracking expenses, forecasting, and financial reporting									
I can administer quality assurance processes to ensure the integrity and reliability of research project outcomes									
Managing Research Project Deliverables									

Ensure that project milestones and outcomes align with established goals. Establish clear deliverables, monitor progress, and address any deviations from the project plan promptly.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I am skilled in executing individual tasks according to project plans									
I understand the processes of documentation for recording progress and outcomes									
I can identify and proactively address potential risks that could impact the achievement of deliverables									
I collaborate with cross-functional teams, integrating various perspectives and expertise into deliverable execution									
I can coordinate and manage multiple tasks simultaneously, ensuring they align with project objectives									

Monitoring and evaluation frameworks and indicators

Administering systematic processes to assess the progress and impact of research projects and initiatives. Define key performance indicators, establish data collection methods, and implement evaluation frameworks to measure project success. Ensure the effective tracking of research outcomes, facilitating data-driven decision-making and continuous improvement in the research process.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the concepts of M&E and their importance in research project results									
I understand the key components of a monitoring and evaluation framework									
I am skilled in creating basic indicators that align with research project goals									
I participate in the implementation of M&E governance frameworks and policies									
I administer advanced performance measurement frameworks to track progress and achievements									

Establishing Research Project Plans

Outline project objectives, timelines, and resource allocation. Collaborate with research team members to define clear goals, delineate tasks, and establish milestones. Develop comprehensive project plans to provide a roadmap for successful execution of the project. Facilitate effective coordination among research team members.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand project planning, including its importance in research									
I can define the scope and objectives of a research project									

I am skilled recognising resources required for a research project									
I can create a project timeline, including milestones, deliverables and deadlines									
I allocate resources effectively, considering personnel, equipment, travel and budget constraints									

Stakeholder Engagement

Stakeholder engagement refers to activities and initiatives that connect the research endeavour with external audiences, stakeholders, and the broader community.

Research Outreach										
Develop strategies to disseminate research findings and engage with diverse stakeholders. Create outreach plans encompassing effective communication channels, collaborations with external partners, and disseminating research outcomes to relevant audiences. Foster meaningful connections and promote the visibility of research initiatives thereby contributing to the broader impact and relevance of the research within the research community and beyond.										
	Knowledge, Skills, and Ability Rating Scale							Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the concepts of research outreach and its significance in dissemination										
I use oral and written communication skills for engaging with diverse audiences										
I am skilled at identifying and understanding the needs of target audiences for research outreach										
I implement metrics and assessment strategies to measure the impact of research outreach activities										
I can engage with multiple media channels for dissemination of research findings										
Academic community relationship collaboration										
Building and maintaining strong relationships with academic institutions, scholars, and researchers. Facilitate partnerships, joint initiatives, and knowledge exchange, to enhance the research ecosystem. Contribute to a collaborative environment, fostering innovation, resource sharing, and the advancement of research agendas within and beyond the academic community										
	Knowledge, Skills, and Ability Rating Scale							Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the importance of collaboration within academic and community contexts										
I establish relationships with academic and community partners, recognising mutual interests										
I understand the needs and challenges of the academic community										
I implement collaborative programs that align with academic and community goals										
I can engage with diverse stakeholders, including academic faculty, students, and community leaders, in collaborative projects										

Community engagement with research										
Establish meaningful connections with diverse communities affected by or interested in the research. Develop strategies for inclusive communication, solicit community input, and ensure the research aligns with community needs and values. Foster open dialogue and collaboration, contribute to the ethical and socially impactful conduct of research, promote community participation and the translation of research outcomes into tangible benefits for the broader community.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the importance of community engagement in the context of research										
I can engage with various communities about research										
I understand the potential impact of research on communities and vice versa										
I implement efforts to build community capacity for research participation										
I establish feedback mechanisms and channels for community input into research design and implementation										
Engagement with Key Stakeholders										
Build and sustain collaborative relationships with influential partners, including academic institutions, industry leaders, policymakers, funders, industry, and community representatives										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the fundamental concepts of stakeholder engagement and its importance to the research ecosystem										
I have skills in identifying and mapping key stakeholders										
I understand the basic principles of effective communication with stakeholders										
I implement efforts to raise awareness of the interests and concerns of different stakeholder groups										
Building Trust within Relevant Research and Strategic Partnerships										
Build and sustain collaborative relationships with influential partners, including academic institutions, industry leaders, policymakers, funders, industry, and community representatives										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the basic importance of trust in professional relationships with key stakeholders in research, including strategic partners										
I show promise in the ability to network and build positive professional relationships										
I have an awareness of the importance of reliability and consistency in partnerships										
I understand the research landscape and the importance of effective communication										

Diplomacy, Negotiation, and Mediation Skills										
Employ tactful communication, adept negotiation strategies, and effective mediation to reconcile differing perspectives and align interests among research team members or stakeholders.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the concepts of diplomacy, negotiation, and mediation										
I have basic communication skills for effective interaction in diplomatic and negotiation settings										
I have awareness of conflicts and the need for mediation in various contexts										
I understand basic principles of active listening as a skill in negotiations										
Handling Difficult Conversations and Partnerships										
Employ tactful communication, adept negotiation strategies, and effective mediation to reconcile differing perspectives and align interests among research team members or stakeholders.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I have a basic understanding of the importance of having structured difficult conversations and their importance to partnerships										
I can improve my communication skills for navigating difficult conversations										
I communicate respectfully and ethically through all forms of communication										
I have emotional intelligence when managing difficult conversations										
Business and Commercial Liaison Management										
Facilitate collaborations between the research team and industry partners or commercial entities. Navigate the intersection of academia and business, identifying opportunities for knowledge valorisation, licensing, or joint ventures.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the importance of business and commercial liaison within the research agenda										
I have an awareness of the interests and concerns of different stakeholder groups										
I understand the basic principles of negotiation for business-related interactions										
I am proficient in identifying and establishing initial connections with commercial partners, understanding basic contractual considerations, and participating in introductory discussions										

Line Management and Talent Development

Line management and talent development are two important aspects related to engagement with a research project, engagement within a research organisation, a research team and/or other specific team leadership activity.

People Management and Managing Team Performance									
Effectively leading and coordinating a team, providing guidance, and fostering a collaborative work environment to ensure the successful execution of research projects. Includes setting clear expectations, monitoring progress, offering constructive feedback, and implementing strategies to enhance individual and collective productivity within the context of the research objectives.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I can set and communicate clear and achievable goals for the team									
I can identify common sources of conflict within the team									
I monitor and report on performance metrics									
I anticipate and plan for future challenges within the team									
I can adapt my communication styles to different team members and situations									
Team Building									
Cultivating a collaborative and high-performing research team by fostering a positive work culture, aligning team members with common goals, and recognising and utilising individual strengths									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of team building within research									
I understand team dynamics									
I practice conflict resolution practices									
I clarify roles and responsibilities within the research team for better coordination									
I understand the importance of aligning team goals with that of the organisation									
Change Management									
Navigating and facilitating transitions within the research team environment/organisation. Effectively communicate changes, address concerns, and support the research team/organisation in adapting to new methodologies or project directions.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the context of change management and its potential impact on the research or the organisation									
I am aware of and understand change models and frameworks									

I address concerns during change in the workplace or within the research team										
I identify key stakeholders and their roles in the change process										
I identify potential obstacles, and develop strategies to mitigate resistance to change										
Coaching Skills										
Guide and develop the professional capabilities of research team members and or research leadership.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the principle of coaching and its importance in researcher or team member development										
I provide constructive feedback to support peer growth										
I work towards a positive impact of coaching on the individual researcher and peers										
I conduct insightful assessments of individuals' strengths and areas for growth										
I assist team members and/or employees in setting and achieving performance and development goals										
Research talent identification and development										
Recognise and nurture the potential of individual researchers. Implement strategies for identifying key skills, provide targeted training, and create opportunities for professional growth within the team/organisation.										
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?			
About You:	NA	0	1	2	3	4	Yes	No	Timeline	
I understand the importance of talent identification, acquisition and development in the research context										
I am skilled to assess the potential of individual researchers										
I am aware of various research career trajectories both within and beyond the research ecosystem										
I assist with the creation of development plans for early-career researchers and peers										
I contribute to mentoring programs to support the development of research talent										

Communication

Communication refers to the exchange of information, ideas, and feedback both within the research team and with external stakeholders.

Building and maintaining relationships with research funders, partners, or other stakeholders									
Cultivate strong connections by ensuring clear communication, delivering on commitments, and understanding collaborators' needs. Foster trust, secure ongoing support, and contribute to a collaborative research environment.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of key stakeholders in research, including funders and partners									
I am skilled at networking and initiating and sustain professional relationships									
I can convey research agendas and results clearly									
I understand the research landscape including funding and collaborations									
I strategically engage with research funders, partners, and stakeholders									
Designing and implementing research communication plans									
Design and implement research communication plans by crafting strategies to disseminate research findings effectively. Identify target audiences, select appropriate communication channels, and tailor messaging to maximise impact. Create clear and engaging communication to enhance the visibility of research outcomes, foster collaboration, and contribute to the broader understanding and application of research within academic, research, professional, and public/private spheres.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I can identify target audiences for research communication									
I am aware of ethical considerations in research communication									
I implement strategies to engage with a multitude of stakeholders									
I use traditional and digital media to amplify research messages									
I craft strategic communication plans aligned with research objectives									
Media liaison and associated activities									
Establish and manage relationships with the media to promote research activities and results. Engage with journalists, facilitate interviews, and strategically communicate research findings to the public. Contribute to the dissemination of accurate information, enhance the visibility of research projects, and foster a positive public perception of the research group, institution, or organisation.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of liaising with the media and its role in disseminating research results									
I am aware of the online and offline media landscape									

I communicate respectfully and ethically through all forms of communication									
I craft strategic approaches for engaging with the media									
I create and adapt key messages for effective communication with the media									
Preparing and writing reports (including evaluation reports and funder reports)									
Synthesize complex research findings into clear and compelling narratives. Ensure reports align with guidelines, effectively communicate project outcomes, and demonstrate the impact of research initiatives.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I know how to write clear and compelling narratives to disseminate research to various audiences									
I can present research results effectively and coherently to funders and other stakeholders									
I am aware of guidelines and standards for various types of reports									
I can apply data analysis skills for meaningful data presentation within reports and narratives									
I can employ an ethical and quality assurance approach for all reports and narratives									
Social Media Engagement									
Leverage digital platforms to disseminate research findings, engage with the public, and build a broader audience. Develop and implement strategies for effective communication on social media, including creating compelling content, participating in relevant discussions, and fostering connections with diverse stakeholders.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I utilize different social media platforms									
I create and manage social media profiles for the research project									
I can identify, understand and target specific audiences on social media									
I can use analytical tools to measure and analyse social media performance									
I implement crisis management strategies in handling challenging issues on social media									

Subject Matter Expertise/Specialised Knowledge

Subject matter expertise refers to a deep and comprehensive understanding of the specialised area or field associated with organisational and/or individual research endeavours.

Pre-Award									
Identify and disseminate funding opportunities; develop and implement funding optimisation strategies; facilitate the writing of funding proposals, including alignment with stakeholder requirements, budgeting and costing and review; coordination of approvals and submissions									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the research landscape and ecosystem, as well as understand the foundational aspects of regulatory and funder compliance related to research proposals and grant applications									
I understand the main components of the research proposal, i.e. including the research statement, objectives, and budget and is familiar with online and e-platforms used for the submission of research proposals									
I understand the basic administrative tasks related to the development and submission of the research proposal and maintain the documentation in an accurate manner									
I have basic communication skills for interacting with researchers, stakeholders and team members									
Post-Award									
Negotiate contracts, manages amendments, as well as the internal setup of the project, the consortium and communication within, liaises with funders, provides administrative facilitate, progress management, accounting, carries out project evaluation, funder reporting, legal advice.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I have a basic understanding of the processes involved in research management, including planning, execution, monitoring and closing									
I have a basic understanding of post-award processes and requirements, as well as the types of contracts, clauses, and implications.									
I understand the components of a grant proposal, including the research statement, objectives, and budget									
I can handle administrative tasks efficiently related to research project management and maintain accurate									

and organized documentation of project activities and milestones, is able to contribute to progress and final reporting									
I have basic communication skills for interacting with team members, consortium partners, stakeholders, and funding agencies.									
Managing equality, diversity and inclusion (including gender, disability and racism)									
Promote diversity in research teams, value varied perspectives, and ensure equal opportunities for all members. Champion EDI principles and contribute to a more inclusive research culture.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the concepts related to equality, diversity, and inclusion (EDI), including key terms and definitions									
I recognise and acknowledge personal biases and stereotypes and understand their potential impact on workplace dynamics									
I am aware of relevant laws and policies related to equality, diversity, and inclusion in the workplace									
I communicate in a way that promotes inclusivity and avoids unintentional biases									
I apply comprehensive practices to foster a more inclusive and respectful workplace environment									
Data Stewardship									
Responsible and ethical handling of research data throughout its lifecycle. Robust data management practices, data security, compliance with privacy regulations, and transparent documentation.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the importance of research data as an organisational asset and its role in decision-making									
I recognise the principles of data quality and the impact of poor data quality on outcomes									
I am aware of the concepts of data governance, including roles and responsibilities									
I understand data compliance requirements and their implications for stewardship									
I classify data based on sensitivity and usage requirements to ensure proper handling									
Knowledge Vaporization (Technology Transfer)									
Facilitate the successful transition of research innovations from the academic, research or laboratory setting to practical applications in the market. Identify commercialisation opportunities, establish collaborations with									

industry partners, and navigate the legal and regulatory aspects of transferring technologies leading to societal impact and the economic value of research outcomes.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the principles of technology transfer, including its role in research and innovation									
I understand intellectual property (IP) rights, including patents, copyrights, and trademarks									
I am knowledgeable of legal and regulatory frameworks related to technology transfer activities									
I understand the process of negotiating and drafting licensing agreements for technology transfer									
I can evaluate the commercial potential of intellectual property assets and technologies									

HR Research— Employment, Training and Terms & Conditions

Ensure the effective functioning of the HR aspects supporting research teams groups and/or organisations. This may include contract administration, salary administration, talent acquisition, performance management, training and development and fostering a positive work environment through initiatives aligning with HR Excellence in Research and others. Align organisational and research goals, optimise individual and research team dynamics, and support the professional development of researchers

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the employment laws and organisational policies as they pertain to research staff									
I understand the recruitment process, including job postings, applicant screening, and interview coordination									
I am knowledgeable of onboarding new research staff, including orientation and introduction to policies									
I address routine and non-routine queries relating to the employment cycle of researchers in the organisation									
I am skilled in resolving conflicts within research teams and or staff, promoting a positive work environment									

Research Finance

Oversee budgetary aspects, financial planning, and compliance within research projects and or at organisational level. Effective allocation of funds, monitor expenditure, and adhere to financial regulations, funding guidelines, having overall fiscal responsibility within research projects at local and or organisational level.

	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand finance, including budgeting, financial statements, and cost accounting									
I understand the basic types of research funding sources and their implications for financial management									
I am knowledgeable of financial compliance requirements related to research grants and projects									
I am skilled in financial documentation and record-keeping for research projects									
I am able to work on and participate in audits, ensuring compliance with financial regulations and funder requirements									
Clinical Research Management									
Oversee and coordinate clinical research activities within a healthcare or pharmaceutical setting. Ensure the successful implementation of research protocols, managing study budgets, and maintaining compliance with regulatory guidelines. Facilitate communication with stakeholders and contribute to the ethical and efficient execution of clinical trials.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand clinical research protocols, including key components such as inclusion/exclusion criteria and study endpoints									
I am skilled in ethical considerations in clinical research, including the importance of informed consent and protecting participant confidentiality									
I know how to maintain accurate and organised study documentation, such as participant records and regulatory submissions									
I am skilled in communicating study updates and addressing operational challenges									
I have knowledge of quality control measures, assist with thorough internal audits and ensure high standards of data integrity throughout the research process									
Research Ethics and Integrity									
Ensure that all research activities adhere to ethical standards, protecting the rights and well-being of participants. Promote transparency, honesty and accountability whilst fostering a culture of integrity within the research team									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline

I understand the importance of integrity and adhere to established ethical guidelines in research practices									
I understand the importance of honesty, transparency, and confidentiality in research practices									
I work to foster commitment to responsible conduct throughout the research process									
I can analyse and address complex ethical dilemmas that may arise during the research									
I understand issues related to authorship, intellectual property, and publication ethics, including proper citation practices data integrity throughout the research process									
Research Infrastructure Management									
Responsible for security and risk management, plans research infrastructure & develops sustainable funding model, infrastructure, and resource management, as well as business development and innovation in research infrastructure.									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the fundamental concepts and importance of research infrastructures. Is familiar with different types of research infrastructures (physical, virtual, and data infrastructures).									
I understand the key components and functions of research infrastructures and understand basic maintenance and operational procedures for research infrastructures. Is familiar with basic safety protocols and procedures. importance of honesty, transparency, and confidentiality in research practices									
I understand basic regulatory and compliance requirements relevant to research infrastructures and is familiar with the documentation and reporting requirements of research infrastructure and related activities.									
I can provide efficient support to the researchers, innovators and other users of research infrastructures.									
Research, Strategy and Policy Development									
Facilitate and facilitate the development, implementation, monitoring and evaluation of research and/or knowledge valorisation policies and strategies									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline

I understand the fundamental concepts and importance of institutional research and/or knowledge valorisation policies and strategies.									
I am aware of the key indicators relevant for the monitoring and evaluation of the research and/or knowledge valorisation policy and strategy									
I contribute to the development and implementation of institutional research and/or knowledge valorisation policy and strategy									
I am one of the key stakeholders relevant for institutional research and/or knowledge valorisation policy and strategy.									
I understand research assessment's fundamental concepts and purposes, including basic assessment methods and metrics.									
Research, Strategy and Policy Development									
Organise, structure, manage, monitor, and review institutional Research Support service(s)									
	Knowledge, Skills, and Ability Rating Scale						Is this an area for professional development?		
About You:	NA	0	1	2	3	4	Yes	No	Timeline
I understand the fundamental concepts and importance of institutional research and/or knowledge valorization policies and strategies.									
I am aware of the key indicators relevant for the monitoring and evaluation of the research and/or knowledge valorisation policy and strategy									
I contribute to the development and implementation of institutional research and/or knowledge valorisation policy and strategy									
I am aware of the key stakeholders relevant for institutional research and/or knowledge valorisation policy and strategy.									
I understand research assessment's fundamental concepts and purposes, including basic assessment methods and metrics.									

Having completed the Self-Assessment Tool, you have assessed your knowledge, skills, and abilities in each competency area. Through this process, you have indicated whether a specific area requires professional development and specified when follow-up is planned. Through this process, you can now conduct a training needs analysis to identify in which area(s) you will focus your learning.

Training Needs Analysis (Individual)

Individual Training Needs Analysis

Objective: Identify key areas for focused learning and development based on self-assessment results across the RM Comp Framework.

Step one: Review of the Self-Assessment Results:

After completing the self-assessment in each of the eight main competency areas, identify areas where your knowledge, skills, and abilities are rated lower (e.g., 0-2 on the rating scale) or where you've indicated a need for professional development.

Step Two: Pinpoint specific competencies that require further development based on your self-assessment. For instance, if the rating for "HR Research" or "Communication" is lower or marked for development, these should be prioritised in the Training Needs Analysis.

In which core competencies have you indicated areas for improvement and training?

Cognitive Abilities/ Personal Attributes	
Technical Proficiency	
Research Project Oversight/Management	
Stakeholder Engagement	
Line Management and Talent Development	
Communication	
Subject Matter Expertise or Specialised Knowledge	

Step Three: Detail Specific Training Needs:

Specify what kind of training is needed within the identified competencies. For example:

Technical Proficiency: Training in advanced statistical analysis tools or machine learning techniques.

Communication: Workshops on effective research communication or stakeholder management.

Step Four: Set Timelines

Determine when you plan to address each training need. Use broad timelines such as "Short-term" (within 6 months), "Medium-term" (within 1 year), or "Long-term" (over 1 year). You may also include specific deadlines based on project requirements or personal career goals.

Examples:

Provide examples of competencies relevant to your current role and how improving these areas will benefit your work. This can help you identify the most pertinent training resources and align them with your professional goals.

Consult RM Comp

Refer to the detailed learning outcomes in RM Comp to guide the selection of appropriate training courses or learning activities. This framework offers extensive resources tailored to Research Managers.

By systematically analysing and documenting these needs, you can create a structured plan for professional development that aligns with your career trajectory and the expectations of your role as a Research Manager.

Training Plan and Implementation Template

Name _____

Date: _____

Competency (e.g., communication)	
Current proficiency level:	Target proficiency level:
Justification for Training: <i>(e.g., Why is this competency important for your role? How will improving this skill benefit your work and the organisation?)</i>	
Competency:	
Current proficiency level:	Target proficiency level:
Justification for Training:	
Competency:	
Current proficiency level:	Target proficiency level:

Justification for Training:
Learning Objectives
Objective 1: (e.g., Improve understanding of research ethics)
Objective 2:
Objective 2:

Planned Training Activities

Training Activity	Description	Mode	Provider	Timeline	Cost
(e.g., online course in research integrity)	(e.g., a comprehensive training course in research ethics and integrity)	(e.g., online)	Epigeum	Q3 2025	FREE

Application for Learning

Project 1:	
Project 2:	
Project 3:	

Evaluation and Follow-up

Evaluation Method: (e.g., Performance review, feedback from team members, self-assessment)
Timeline for Evaluation: (e.g., 3 months post-training)
Criteria for Success: (e.g., Successful application of HR research in project X)

Approval and Sign-off

Manager/Supervisor's Name:
Signature:
Date:

Organisational Training Needs Analysis

Creating a Training Needs Analysis (TNA) tool for research organisations involves multiple layers of assessment to identify the skills gap, organisational needs, and external factors influencing training requirements. Below is a structured guide on how to develop this TNA tool using SWOT, PESTLE, and other relevant tools and concepts.

Step One: Establish the Objective

- Purpose: *Identify the skills, knowledge, and competencies required by research managers to effectively manage research projects, teams, and operations in a research/higher education setting.*
- Scope: *Focus on research management within research organisations/higher education institutions, considering both current needs and future trends.*

Step Two: Stakeholder Identification and Engagement

- Who? *Include research managers, senior leadership, HR, and relevant academic staff.*
- How: *Conduct interviews, surveys, and focus group discussions to gather insights on current competencies and perceived gaps.*

Step Three: Organisational Context Analysis

SWOT Analysis:

- Strengths: *Identify internal strengths related to research management (e.g., experienced staff, robust research culture).*
- Weaknesses: *Identify internal weaknesses that may hinder effective research management (e.g., lack of training in project management or funding acquisition).*
- Opportunities: *Identify external opportunities (e.g., new funding opportunities, collaborations, technological advancements).*
- Threats: *Identify external threats (e.g., changes in funding policies, increasing competition for grants).*

PESTLE Analysis:

- Political: *Assess the impact of government policies, regulations, and funding on research management.*
- Economic: *Consider budget constraints, economic conditions, and funding availability.*
- Social: *Evaluate demographic changes, cultural factors, and societal expectations affecting research.*
- Technological: *Assess the impact of new technologies, digital tools, and platforms used in research management.*

- Legal: *Consider compliance requirements, intellectual property laws, and ethical standards.*
- Environmental: *Understand sustainability practices, environmental policies, and green research initiatives.*

Step Four: Skills and Competency Gap Analysis

Current Competency Mapping:

- Assess the existing skills and knowledge of research managers using competency frameworks.
- Identify competencies in areas like research ethics, project management, funding acquisition, team leadership, and communication.

**See the self-assessment tool*

Future Competency Needs:

- Identify emerging skills required due to changes in the research landscape, such as data analytics, digital literacy, and interdisciplinary collaboration and AI.

Competency Gap Assessment:

- Compare current competencies against future needs to identify gaps.
 - Use self-assessment tools
 - 360-degree feedback
 - Performance reviews
 - Mentoring

Step Five: Training Prioritization Matrix

Urgency vs. Importance:

Prioritise training needs based on their impact on organisational goals and the urgency of addressing these gaps.

- High urgency, high importance: Immediate training required.
- High urgency, low importance: Short-term solutions or quick fixes.
- Low urgency, high importance: Long-term training programs.
- Low urgency, low importance: Monitor for future needs.

Budget and Resource Consideration:

- Assess available resources for training (budget, time, external trainers).
- Prioritise training programs that offer a high return on investment.

Step Six: Design and Implementation of Training Programs

Tailored Training Programs:

- Develop (where feasible) specific training programs (e.g., workshops on grant writing, leadership development programs) to address identified gaps.

Learning Modes:

- *Consider a mix of in-person workshops, online courses, mentoring, and on-the-job training.*

Customization:

- Tailor training content to the specific needs of research managers, incorporating case studies and examples relevant to higher education research management.

Step Seven: Evaluation and Feedback Mechanisms

Kirkpatrick's Four Levels of Evaluation:

Level 1 Reaction: Gather participant feedback on training satisfaction.

Level 2 Learning: Assess knowledge and skills gained through pre- and post-training tests.

Level 3 Behaviour: Observe changes in behaviour or application of skills in the workplace.

Level 4 Results: Measure the impact of training on organisational goals (e.g., improved grant success rates).



Continuous Improvement:

Use feedback and evaluation results to continuously refine and update the TNA tool.

Regularly review and adjust training to address evolving needs.

Step Eight: Integration with Organisational Strategy

- Alignment with Strategic Goals:
 - Ensure that training programs align with the organisation's overall strategic goals.
 - Link training outcomes to key performance indicators (KPIs) such as research output, publication quality, and successful funding applications.
- Sustainability and Long-term Planning:
 - Develop a long-term training and development plan to ensure sustained competency development.
 - Incorporate leadership development and succession planning for research managers.

Step Nine: Documentation and Reporting

Comprehensive Reporting

- ✓ Document the entire TNA process, findings, and recommended training programs.
- ✓ Provide clear recommendations for implementation, with timelines and resource requirements.

Regular Updates:

- ✓ Schedule periodic reviews and updates of the TNA tool to adapt to organisational and external environment changes.

Step 10: Implementation Plan

- Action Plan: Develop an implementation plan with timelines, responsibilities, and resource allocation.
- Pilot Testing: Conduct a pilot of the TNA tool with a small group of research managers and refine it based on feedback.

Resources/Tools and Templates

SWOT and PESTLE Templates

Template 1: Swot Analysis

Instructions:

1. Identify Internal Strengths and Weaknesses: Assess your organisation's internal environment, including resources, capabilities, processes, and cultural factors.
2. Identify External Opportunities and Threats: Examine the external environment to identify opportunities and threats that could impact the organisation.

Example:

Internal Factors	Strengths	Weaknesses
<i>Resources</i>		
<i>Capabilities</i>		
<i>Processes</i>		
<i>Cultural Factors</i>		

External Factors	Opportunities	Threats
<i>Market Threats</i>		
<i>Technological Advances</i>		
<i>Regulatory Environment</i>		
<i>Economic Environment</i>		

Template 1:

Internal Factors	Strengths	Weaknesses

External Factors	Opportunities	Threats

Template 2: PESTLE Analysis

PESTLE Analysis Template

Instructions:

1. Assess Each PESTLE Factor: Consider the elements that could affect research management within your organisation.
2. Evaluate the Impact: Determine how each factor influences the organisation and prioritize them based on their significance.

Example:

Factors	Description	Impact on Organisation
<i>Political</i>		
<i>Economic</i>		
<i>Social</i>		
<i>Technological</i>		
<i>Legal</i>		
<i>Environmental</i>		

Template 2:

Factors	Description	Impact on Organisation
<i>Political</i>		
<i>Economic</i>		
<i>Social</i>		
<i>Technological</i>		
<i>Legal</i>		
<i>Environmental</i>		

Training Needs Prioritization Matrix

Instructions:

1. List Training Needs: Identify the various training needs of research managers.
2. Assess Importance: Evaluate the importance of each need based on its impact on organisational goals.
3. Assess Urgency: Determine the urgency of addressing each need.
4. Prioritise: Use the matrix to prioritise training needs, focusing on those that are both high importance and high urgency.

Prioritization Matrix Template

Example 3

Urgency	High	Low
Importance	High	Immediate Priority
	- [Training Need 1]	- [Training Need 2]
	Low	Short-Term Focus
	- [Training Need 3]	- [Training Need 4]

Template 3

Urgency	High	Low
Importance	High	
	Low	

Evaluation Tools for Kirkpatrick's Model

Instructions:

- Customise the Surveys and Assessments: Modify the content to reflect the specific training objectives and organisational context.
- Implement Across All Levels: Use the tools systematically after each training program to gather comprehensive evaluation data.

Level 1: Reaction (Satisfaction Survey)

Survey Questions:

1. How satisfied were you with the training content?

Very Satisfied ☐

Satisfied ☐

Neutral ☐

Unsatisfied ☐

Very Unsatisfied ☐

2. How relevant was the training course to your job?

Highly Relevant ☐

Relevant ☐

Somewhat Relevant ☐

Not Relevant ☐

3. What did you like most about the training?

4. What could be improved?

Level 2: Learning (Knowledge Assessment)

Pre- and Post-Training Quiz:

- Question 1: Describe the key steps in securing a research grant.

- Question 2: Explain the importance of research ethics in project management.

- Scoring: Compare pre-training and post-training responses to measure knowledge gained.

Level 3: Behavior (Behavioral Change Assessment)

Behavioral Observation Checklist:

- Criteria:
 - Demonstrates improved project planning skills ☐
 - Applies ethical considerations in decision-making. ☐
 - Effectively communicates with research team members. ☐
- Rating Scale:
 - Not Observed ☐
 - Rarely Observed ☐
 - Sometimes Observed ☐
 - Often Observed ☐
 - Always Observed ☐

Level 4: Results (Impact on Organisational Goals)

Key Performance Indicators (KPIs):

- Metric 1: (e.g., *Increase in successful grant applications.*)

- Metric 2: (e.g., Improvement in research project outcomes (e.g., timely completion).

- Metric 3: (e.g., Reduction in compliance issues or ethical violations.)



Data Collection Method:

- Compare organisational performance data before and after training implementation to evaluate the impact on these KPIs.



Professional Development Workbook

Pework; Evaluation, Guidance, Reflection

Step one: Evaluation

Evaluate: Having completed the training needs analysis, you have identified area(s) to focus your growth and learning. Once you have identified areas for professional growth from the self-assessment tool, refer to the RM Comp to access 800 learning outcomes to support your career development (**refer to section 2 for more information**).

Step two: Guidance

Seek Guidance: Discuss with your manager or a trusted colleague **how your engagement with Cardea may help you in your current role and/or in your career progression.**

**NOTE: Using the RM Comp as a tool and the results of the analysis exercise, select skills and/or competencies to develop with input from a mentor and/or supervisor.*

Step Three: Reflection

Write your Personal Development Plan based on your reflections, conversations, and training needs assessment. But first, capture some thoughts in the pre-work reflection template below.

1. What do you hope to achieve by engaging with RM Comp?

2. Would you like to change and/or develop anything? We encourage you to reflect throughout this process.

3. Choose one practical application your learning may have within your organisation (team working, stakeholder relationships, projects you are involved in, etc.).

4. What skills and attitudes will you need to develop to achieve this?

5. Skill/Competency to Develop:



Example: *To map the skills and competencies I want or need to develop, I have reviewed the RM COMP framework to identify areas most relevant to my current and future career goals. While I have strengths in research oversight and subject matter expertise, I recognise the need to further develop competencies in Line Management and Talent Development, particularly in areas such as team performance management, coaching skills, and research talent identification and development. Additionally, I aim to strengthen my Technical Proficiency in Data Stewardship, AI for Research Managers, and Legal Skills, as these are becoming increasingly critical in the evolving research environment. I also see value in enhancing my Stakeholder Engagement skills, especially in building trust within strategic partnerships and handling difficult conversations, to ensure effective collaboration and long-term impact in interdisciplinary and cross-sector projects.*

Cognitive Abilities/Transversal Skills

Cognitive abilities generally refer to a set of transferable skills that are relevant across various tasks and situations. These skills are often considered necessary for effective leadership, management, and collaboration in diverse organisational environments, including research. Also known as transversal skills, they enable overall professional success and adaptability.

Examples of Cognitive Abilities included but are not limited to:

Creativity
Critical thinking
Cultural Sensitivity
Problem Solving
Strategic Planning
Decision Making
Stress Management
Prioritization Time Management and Multitasking
Adaptability and Professional Flexibility

Example: Cognitive Abilities/Personal Attribute

Develop critical thinking skills through reading and discussing academic literature relevant to your field.

Attend workshops or training sessions on problem-solving techniques and strategic planning.

Engage in interdisciplinary discussions to broaden your perspective and enhance creativity.

Technical Proficiency

Technical proficiency refers to the ability to use specialised tools, methods, and technologies relevant to the research field/area/organisation. Individuals with technical proficiency can successfully navigate and contribute to the resolution of complex problems within that technical context.

Examples of technical proficiency competencies included but are not limited to:

- Research data collection and collation.
- Data and statistical analysis
- Legal Skills
- IT skills for research activities

Example: Technical Proficiency

Identify specific technical skills relevant to your research area and set goals for improvement.

Enroll in online courses or workshops to enhance proficiency in research data analysis tools and methods.

Collaborating with colleagues or seek mentorship to learn new techniques or technologies

Research Project Oversight/Management

Research project oversight/management refers to the planning, execution, monitoring, and general management of research activities to achieve specific research project results within pre-defined constraints such as time, budget, and research scope.

Examples of Research Project Oversight/Management competencies included but not limited to:

- Research Project Management
- Managing research project deliverables
- Designing monitoring and evaluation frameworks and indicators
- Establishing research project plans

Example: Research Project Management/Oversight:

Review past research projects you have managed and identify areas for improvement in project planning and execution.

Seek feedback from colleagues or supervisors to identify strengths and weaknesses in your project management approach.

Develop a project management toolkit with templates, checklists, and best practices to streamline future projects.

Stakeholder Engagement

Stakeholder engagement refers to activities and initiatives designed to connect research with external audiences, stakeholders, and the broader community.

Examples of Community Engagement include but not limited to:

- Research Outreach
- Academic community relationship collaboration
- Community Engagement with Research
- Provision of training for outreach engagement
- Engagement with key stakeholders

Example: Community Engagement:

Assess your current level of engagement with external stakeholders and communities.

Identify opportunities to expand your network and deepen relationships with key stakeholders.

Volunteer for outreach activities or community service projects to enhance your engagement skills and broaden your impact.

Line management and Talent Development

Line Management and talent development are two important factors both of which are critical within a research project, a research organisation, a research team and/or other specific team leadership activities.

Examples of Line Management and Talent Development included but not limited to:

- People Management and managing team performance.
- Team Building
- Change Management
- Coaching skills
- Research talent identification and development.

Example: Line Management and Talent Development:
Reflect on your experience managing teams and developing talent within your organisation.
Identify areas for improvement in leadership and team-building skills.
Seek mentorship or coaching to enhance your ability to support the professional development of your team members.

Communication

Communication refers to the exchange of information, ideas, and feedback both within the research team and with external stakeholders.

Examples of Communication included but not limited to:

- Building and maintaining relationships with research funders, partners or other stakeholders
- Designing and implementing research communication plans
- Media Liaison and associated activities
- Preparing and writing reports (including evaluation reports and funder reports)
- Social Media Engagement

Example: Communication:
Evaluate your communication skills in both written and verbal formats.
Set goals for improving communication with internal and external stakeholders.
Practice active listening and seek opportunities to receive feedback on your communication style.

Subject Matter Expertise

Subject matter expertise refers to a thorough understanding of the specific specialised area or field associated with an organisation and/or individual roles within an organisation.

Examples of subject matter expertise competencies included but not limited to:

- Pre-Award
- Post Award
- Managing equality, diversity and inclusion (including gender, disability and racism)
- Data Stewardship
- Technology Transfer
- HR Research – Employment, training etc.
- Research Finance
- Clinical Research Management
- Research Ethics and Integrity
- Research Infrastructure Management
- Research, Strategy and Policy Development

Example: Subject Matter Expertise/Specialised Knowledge:
Assess your current level of expertise in key subject areas related to your role as a research manager.
Identify gaps in knowledge and create a plan to address them through self-study, training, or networking opportunities.
Participate in conferences, seminars, or webinars to stay current on the latest developments in your field of expertise.

Goal Setting

Goal setting plays a pivotal role in personal and professional development, serving as a compass that guides you toward your desired outcomes. Setting clear and achievable goals allows you to establish a personalised roadmap for success, providing direction and focus to a desired competency level. Goals create a sense of purpose and motivation, inspiring individuals to act and persevere in the face of obstacles.

Moreover, goal setting breeds accountability and self-discipline, as you commit to specific targets and track your progress over time. It encourages reflection and growth as you evaluate their performance and adjust your strategies accordingly. Ultimately, goal setting empowers RMs to realize their full potential, driving continuous improvement and achievement.



Use **SMART** Criteria to describe your goals:

S - Specific, **M** - Measurable, **A** - Action Oriented, **R** - Realistic; within your control and **T** - Time constrained



Action Plan

Short-Term Goals	Medium-Term Goals	Long-Term Goals
(3-6 months)	(6-12 months)	(12+ months)
• Identify one competency area to focus on initially and set specific, achievable goals. • Schedule regular check-ins with a mentor or supervisor to track progress and receive feedback.	• Expand your focus to additional competency areas, setting milestones and timelines for achieving progress. • Seek opportunities for professional development, such as workshops, conferences, or online courses.	• Continuously assess and adjust your personal development plan based on evolving priorities and feedback. • Aim to achieve mastery in each competency area over time, recognising that development is an ongoing process.

Reflection and Evaluation:

- ✓ Regularly reflect on your progress toward achieving your development goals.
- ✓ Evaluate the effectiveness of your actions and adjust your plan as needed.
- ✓ Celebrate successes and learn from setbacks to continuously improve and grow as a research manager.

PDP Templates

PDP- 12 MONTHS

Name _____

Date: _____

CURRENT SITUATION	<i>What training and development opportunities am I currently undertaking?</i>
Career Goal(s)	<i>What is my 12-month Career Goal? (using SMART criteria)</i>
Competency Gap	<i>What skills, knowledge or resources do I need to achieve the career goal(s)?</i>
Actions	<i>What actions will you take to address the competency gaps?</i>

Mentoring Workbook

Welcome

Mentoring is not just a feature but a cornerstone of professional development, which is pivotal in developing research managers in the ERA. We deeply value the role of mentors in this process, recognising the significant impact they can have on the professional growth of our research managers. Your role as a mentor is not just important; it's essential. We understand that many institutions already have established mentoring schemes, and this material is specifically designed to complement and strengthen those existing structures, ensuring we can offer even more robust support for mentoring within your institution.

Setting up a mentoring scheme

How can you set up a mentoring scheme in your **institution**? Are there supports in place?

See **[UCC Staff Wellbeing & Development](#)**

Mentoring Commitment

The role of the mentor is to encourage the development of the delegate by providing mentees with information, advice, guidance and support. Ideally, the mentee will bring topics to the meeting that align with the mentoring arrangement, and the mentor will facilitate the learning process through questioning, examples, and information.

Mentoring as a concept:

M – Manages the relationship

E – Encourages

N – Nurtures

T – Teaches

O – Offers mutual respect

R – Responds to the mentees' needs

The mentor acts as a guide and sounding board but has no responsibility for the actions and decisions of mentees. Many institutions will have existing and well-structured protocols for mentoring. In such cases, the institutional scheme procedures and

requirements will apply. However, suppose the institution has limited experience and capability. In that case, we want to reassure you that we have set out some tools and approaches that can be used in this document to support you in this process. We are here to provide the necessary support and guidance to ensure the successful establishment of a mentoring scheme in your institution. You are not alone in this; we are here to help. We are confident in your ability to establish a successful mentoring scheme with our support.

What is the difference between mentoring and **coaching**?

A Mentor:

- Advises & suggests
- Share knowledge and experience
- Leads by example
- Gives examples and ideas
- Is usually more experienced (than mentee)

A Coach:

- Creates space to think
- Challenges beliefs, thoughts and behaviours
- Facilitates self-discovery
- Draws out (from coachee) examples and ideas
- Need not be an expert

Benefits of Becoming a Mentor

Each circumstance and experience will differ depending on your relationship with the mentee. However, some of the general benefits of becoming a mentor include but are not limited to:

- Relationship management
- Communication skills development
- Listening/Active Listening
- Self-Reflection
- Leadership Development
- Networking

Defining Mentoring

The term mentor derives from Greek mythology, through Homer's writings in his poem *The Odyssey*. A mentor was considered a guide, a teacher, a tutor, and Odysseus' most faithful advisor.

Mentor: "A trusted counsellor or guide" (Merriam-Wester, 2024)

According to Arnesson and Albinsson (2017), mentoring is based on the mentee's goals, and the mentor acts in a supporting role. The mentor's role can vary significantly but should include emotional, psychological, or career-development support. Mentorship benefits both the mentor and the mentee. It should be both a rewarding and developmental experience, and the relationship between the mentor and mentee is personal.

The "Job Description" of a Mentor

Each circumstance will differ based on the mentor's and mentee's expectations in the mentorship relationship. However, some of the critical tasks of a mentor include, but are not limited to:

- The provision of information, guidance and support for mentees.
- Engage mentees to foster growth and development.
- Build confidence
- Identify barriers to growth and development
- Inspire, aspire and raise motivation.
- Identify areas for training and development.
-

The mentor becomes "a crutch" for the mentee. The mentor aims to:

- Identify learning opportunities
- Provide a safe space to share
- Become a sounding board
- Become a role model
- Encourage self-reflection
- Encourage self-direction
- Motivate
- Inspire

The Mentor assists the Mentee in:

- Practising, evaluating, and refining their ideas and processes in a supportive environment, allowing them to become confident and skilled professionals.
- Developing and enhancing self-awareness and interpersonal skills to improve their effectiveness in the workplace.
- Gaining a professional perspective to understand their work performance within the broader workplace and community context.
- Building self-evaluation abilities and independent learning skills, enabling them to maximise benefits from all learning experiences and proactively seek future learning opportunities.

Personal Attributes and Qualities for Effective Mentoring

Attitude:

- Available: Has sufficient time to dedicate to the mentee.
- Flexible and Open-minded: Adaptable and receptive to new ideas.
- Open: Willing to share personal experiences, be honest about themselves, and provide truthful feedback to the mentee.
- Enthusiastic: Genuinely interested in the mentee's concerns, needs, goals, and aspirations.
- Empathic: Capable of understanding the mentee's thoughts, feelings, and behaviours.
- Positive in Outlook: Able to understand the mentee's perspective and find solutions.
- Supportive of Career Development: Committed to helping delegates develop their careers and particularly supportive of their mentees.

Skills:

- Good Listener: Fully attentive to the mentee without letting personal thoughts interfere.
- Motivating and Encouraging: Able to direct the mentee's energy towards positive change, new challenges, and overcoming obstacles.
- Balanced: Provides the right mix of challenge, encouragement, and support.
- Supportive Communication Style: Uses a coaching approach to communicate effectively.

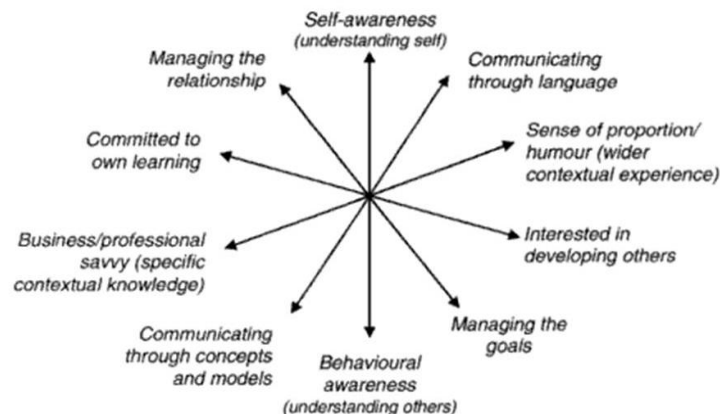
Knowledge:

- Organisational Understanding: Knowledgeable and experienced within the organisation, familiar with its culture.

- **Higher Education Experience:** Possesses sufficient experience in higher education to offer valuable advice and support.

The mentor's role depends on applying a flexible and adaptive approach and fostering an environment where the mentoring relationship can thrive.

the practice of mentoring will primarily depend on mentor competences
(Clutterbuck, 2004)



Key Mentoring Skills

Active Listening

Active listening involves fully concentrating, understanding, and responding thoughtfully to the mentee. It helps build trust and shows the mentee that their thoughts and concerns are valued.

Constructive Feedback

Providing constructive feedback means offering specific, actionable suggestions to help the mentee improve. This type of feedback should be balanced with positive reinforcement to encourage growth.

Communication

Effective communication is clear, concise, and open, facilitating mutual understanding. Good communication skills help articulate thoughts, provide feedback, and resolve misunderstandings.

Relationship Building

Building a solid mentoring relationship involves building trust, respect, and mutual understanding. This can be achieved through consistent and meaningful interactions.

Leadership

Exemplifying strong leadership involves guiding, inspiring, and supporting the mentee. Good leaders model behaviour that mentees can emulate and provide a vision for their growth and development.

Empathy

Empathy is the ability to understand and share the feelings of the mentee. It helps create a supportive and nurturing environment, making the mentee feel understood and valued.

Goal setting

Setting clear, achievable goals provides direction and purpose for the mentoring relationship. It helps both mentor and mentee stay focused and measure progress over time.

Action Planning

Action planning involves outlining specific steps to achieve the set goals. It provides a roadmap for the mentee, helping them stay organised and on track to reach their objectives.

Defining the Mentorship Process

Relationship Building

Establishing open and honest communication is crucial in the initial stages of building a mentoring relationship. Setting clear expectations and goals helps both parties understand the purpose and direction of the mentorship. Knowing each other's backgrounds, interests, and professional aspirations fosters trust and rapport. This foundation of mutual respect and understanding paves the way for a productive and supportive mentoring relationship.

**Please use the first meeting checklist tool to help establish the relationship.*

Boundary Setting

Setting boundaries in a mentoring relationship is essential for maintaining professionalism and mutual respect. Clearly defining the scope of the mentorship, including the frequency and mode of communication, helps manage expectations. It's essential to agree on confidentiality terms and respect each other's time commitments. Establishing these boundaries early on ensures a structured and productive relationship, allowing the mentor and mentee to thrive within agreed-upon limits.

**Please use the mentorship agreement to help you to establish the relationship.*

Setting expectations and working together

Setting expectations and working together involves clearly defining the goals and objectives of the mentoring relationship from the outset. Mentors and mentees should agree on their roles, responsibilities, and desired outcomes, ensuring alignment and fostering a collaborative and productive partnership.

Frequency and process of meeting

Mentors should meet with their mentee 4 to 6 times, for 40 minutes to an hour, spaced 2 to 4 weeks apart. The mentee is responsible for setting up meetings and defining the agenda. If the mentee has no core topics to discuss, focus on a recent teaching session. The mentee should do most of the talking, with the mentor offering thoughts and encouragement. Mentors should avoid giving directive advice unless it concerns safety, security, or compliance.

Effective endings

As the mentoring partnership nears its end, both parties should plan for a proper closure. Announce the impending end at the penultimate meeting to allow for mental preparation and necessary discussions. Handle the ending sensitively due to the personal and emotional nature of the relationship. In the final meeting, review progress, celebrate achievements, and share experiences to provide a sense of closure. If both parties see benefits in continuing the relationship, discuss potential forms it might take, whether as occasional acquaintances, friends, or a new mentoring cycle, with agreed-upon boundaries and expectations.



Templates

Sample Mentoring Agreement Template

This agreement between:

_____ Mentee

Start Date_____

_____ Mentor

Start Date_____

This agreement states that the mentee and the mentor commit to regular contact and the responsibilities outlined in the table below.

The Mentee:	The Mentor:
• Shall be responsible for planning, booking an appropriate venue and setting the agenda. • Shall engage in the process and notify the mentor of the meeting agenda in good time. • Will not ask the Mentor to act on their behalf in any capacity outside of the mentoring relationship. • Will give suitable and helpful developmental feedback to the Mentor on how the process might be improved	• Shall protect the required time and be available as agreed, giving the Mentee their undivided attention for the duration of the meeting • Will not discuss the contents of the meeting without consent with any other party unless they have serious, urgent concerns about the safety or legality of the mentee • Shall give honest feedback in a constructive and respectful way • Will act by best practice throughout the mentoring relationship

Dates and mode of communication are to be mutually agreed, and both parties agree to give at least 48 hours' notice of cancellation or rescheduling unless due to illness.

No-Fault Termination

We are committed to open and honest communication in our relationship. We will discuss and attempt to resolve any conflicts or issues as they arise. However, if one of us needs to terminate the relationship for any reason, we agree to abide by one another's decision.

Confidentiality

While this is an informal and voluntary relationship, the bounds of confidentiality should be agreed upon and articulated at the start of any relationship. Usually, mentoring conversations are confidential unless there is an issue relating to personal safety or legality.

Signed_____ Mentor Date

Signed_____ Mentee Date

First Mentoring Meeting Checklist Template

Personal <i>Build rapport by introducing yourself and gaining an understanding of the background of the mentee.</i>	
1. What have been the key milestones in your career to date? 2. What has been your most outstanding achievement in your career so far? 3. What are your aspirations for the future? 4. What do you hope to gain from Cardea and the mentoring relationship? 5. Give a summary of the mentor's background, sharing appropriate levels of information.	
Professional <i>Discuss the roles and responsibilities of both mentor and mentee. Define the scope of the relationship.</i>	
1. What do you both think mentoring is? 2. What is expected from each of us? 3. What is not part of the relationship? 4. What is the purpose and aim of the relationship? 5. What is confidential, and what is not? What does confidentiality mean to both parties? 6. Role of respect and acceptance of difference? 7. Go through any Mentoring Agreement being used	
Procedural <i>Define and agree on expectations for meetings, paperwork and timings.</i>	
1. Who will arrange meeting locations (e.g., teams)? 2. What notice is required for cancellation? 3. Where will you meet, and for how long? 4. Discuss the role of personal responsibility and commitment	
Psychological <i>Discuss how you can best work together. Agree on rules of confidentiality, giving feedback and how sessions will run.</i>	
1. How do both parties work best? 2. What does the mentor need to know to get the best out of the mentee? 3. Role of challenge, honesty and appropriate and relevant disclosure amount. 4. What are the rules for giving feedback? What if you encounter issues or problems?	

Reflective Journaling Templates

Templates for journaling seven competencies

This section contains journaling templates tailored to the seven competency areas for Research Managers.

Cognitive Abilities/Personal Attributes

Reflective Prompt:

- Describe a recent challenge or problem you encountered in your research management role.
- Analyse the situation using critical thinking skills. What different perspectives did you consider?
- Reflect on your strategies to address the challenge and any creative solutions you developed.
- Identify any areas where you can further develop your cognitive abilities.

Describe:

Analyse:

Reflect:

Identify:

Technical Proficiency:

Reflective Prompt:

- Document your experiences with technical tools and methods used in research management (e.g., data collection, analysis, IT skills).
- Reflect on your proficiency level in each area. What aspects do you feel confident in, and where do you see room for improvement?
- Describe any challenges you faced when applying technical skills to your research projects.
- Identify opportunities for further training or skill development to enhance your technical proficiency.

Describe:

Analyse:

Reflect:

Identify:

Research Project Management/Oversight:

Reflective Prompt:

- Document your experiences in planning, executing, and monitoring research projects.
- Reflect on your project management strategies and the effectiveness of your oversight.
- Describe any challenges or obstacles you encountered during project management and how you addressed them.
- Identify lessons learned and areas for improvement in your project management approach.

Describe:

Analyse:

Reflect:

Identify:

Stakeholder Engagement:

Reflective Prompt:

- Reflect on your engagement efforts with external audiences, stakeholders, and the broader community.
- Describe recent interactions or initiatives aimed at connecting research with the community.
- Analyse the impact of your community engagement activities and any lessons learned.
- Identify opportunities to enhance your community engagement strategies and build stronger connections.

Describe:

Analyse:

Reflect:

Identify:

Communication:

Reflective Prompt:

- Reflect on your communication efforts within and outside the research team.
- Describe recent interactions with stakeholders, funders, partners, and media.
- Analyse the effectiveness of your communication strategies and the impact on project outcomes.
- Identify areas for improvement in your communication skills and strategies for enhancing information exchange and collaboration.

Describe:

Analyse:

Reflect:

Identify:

Line Management and Talent Development:

Reflective Prompt:

- Document your experiences in managing teams and developing talent within your organization.
- Reflect on your leadership style and the effectiveness of your management approach.
- Describe any challenges or successes you encountered in managing team performance and development.
- Identify areas for growth as a leader and strategies for supporting the professional development of your team members.

Describe:

Analyse:

Reflect:

Identify:

Subject Matter Expertise/Specialised Knowledge:

Reflective Prompt:

- Reflect on your understanding of specialized areas relevant to research management (e.g., research finance, ethics, technology transfer).
- Describe recent experiences where you applied subject matter expertise in your role.
- Analyse how your expertise contributed to the success of research projects or initiatives.
- Identify areas for continuous learning and development within your specialized areas of knowledge.

Describe:

Analyse:

Reflect:

Identify:

Generic Templates

Generic templates for structuring reflective journal entries:

Template 1: Situation-Reflection-Action

Situation:

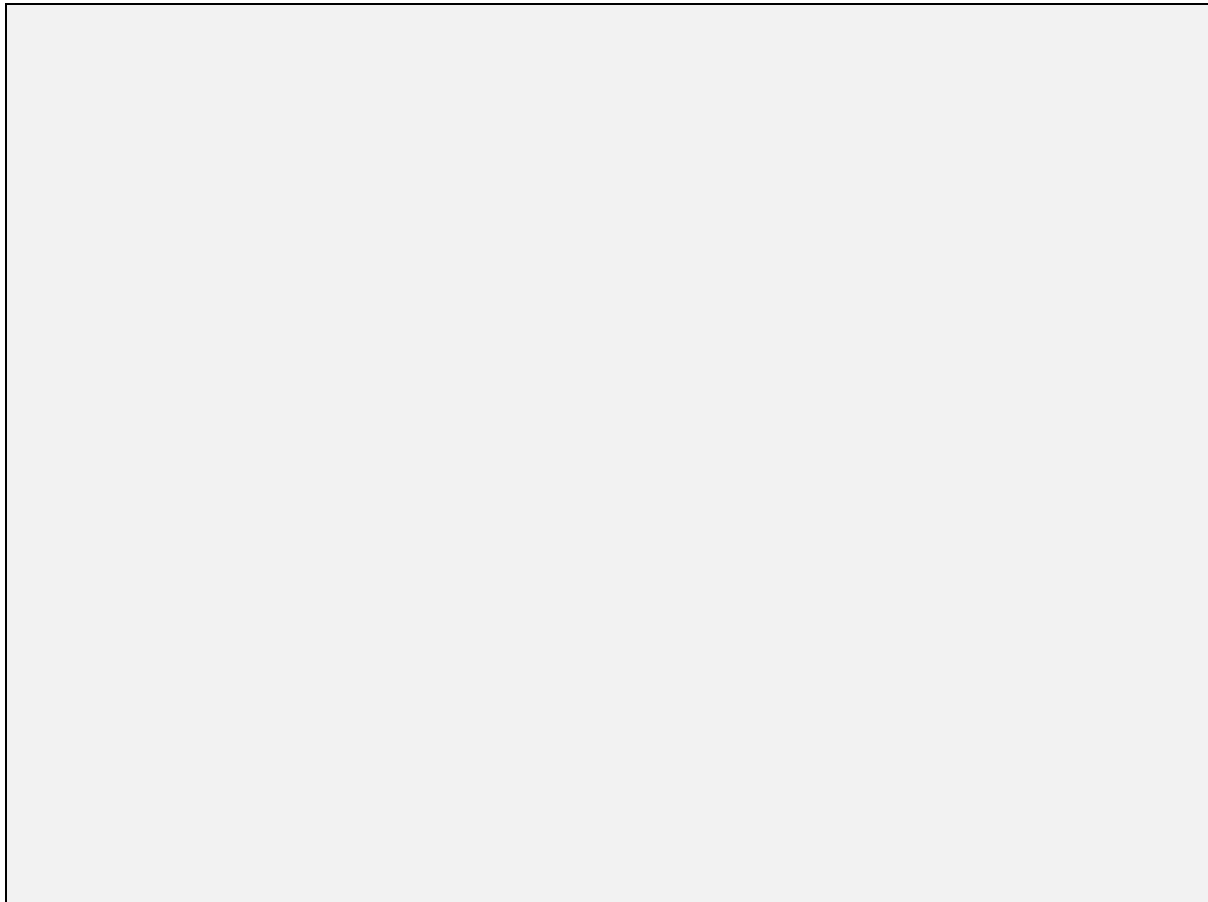
Briefly describe the situation or experience you're reflecting on.

Reflection:

Explore your thoughts, feelings, and reactions to the situation. Consider how it aligns with your values, beliefs, and goals. Analyse what you learned from the experience and any insights gained.

Action:

Identify specific actions or changes you intend to make based on your reflection. Consider how you can apply what you've learned to similar situations in the future.



Template 2: What-So What-Now What

What:

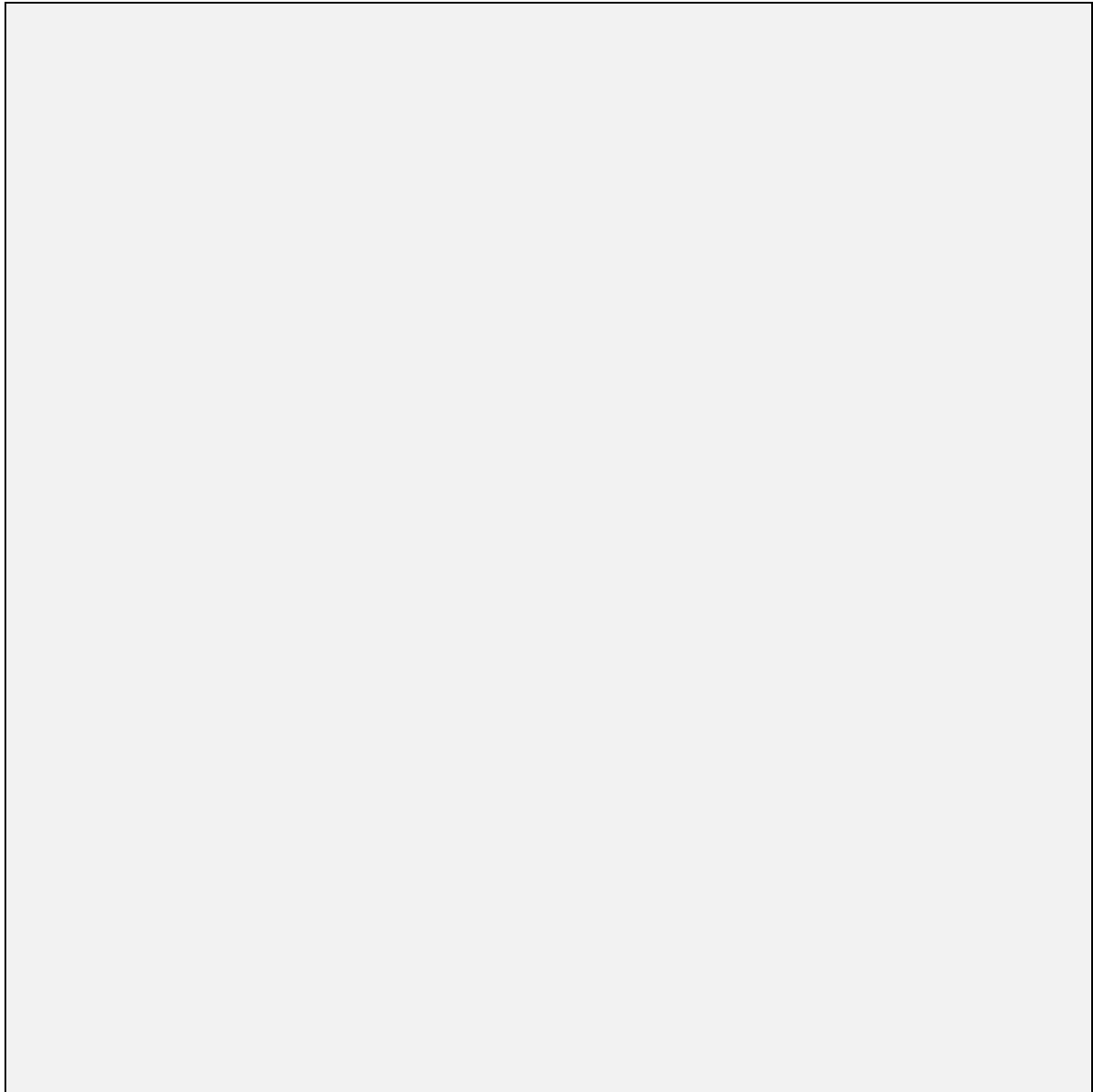
Describe the event or situation you're reflecting on in detail. What happened? Who was involved? What were your thoughts and feelings at the time?

So, What:

Reflect on the significance of the experience. What did you learn about yourself, others, or the situation? How does it relate to your personal or professional development?

Now What:

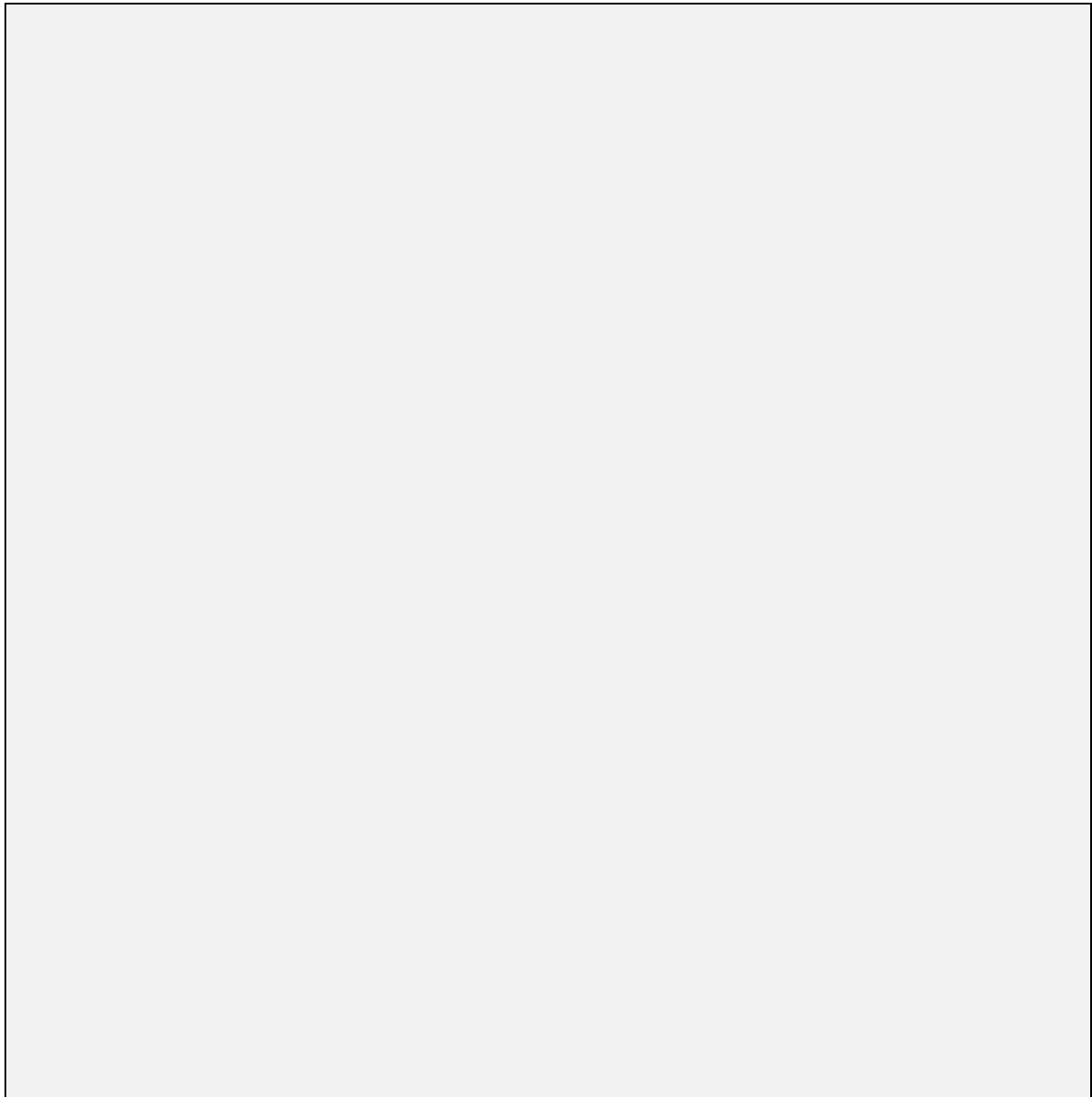
Consider the implications of your reflection. What actions will you take moving forward? How will you apply what you've learned to future situations?



Template 3: Journal Prompts

Use open-ended prompts to guide your reflection. Some examples include:

- *What was the most challenging part of today?*
- *What am I grateful for right now?*
- *How did I respond to conflict today, and how could I handle it differently in the future?*
- *What did I learn about myself from today's experiences?*
- *What are three things I can do tomorrow to improve my well-being?*



Appendix D

Sample Communication Plan⁷: RM Role Alignment Rollout

Objective:

To ensure staff understand, engage with, and contribute to the successful implementation of the RM1–RM4 framework through clear, inclusive, and ongoing communication.

1. Pre-Rollout Communication

- Announcement Email from Leadership
 - Introduce the RM1–RM4 framework, its purpose, and benefits.
 - Include a timeline and next steps.
- Dedicated Intranet Page
 - Host all materials including role descriptions, progression criteria, FAQs, and contact points.

2. Information Sessions

- Live Briefings / Town Halls
 - Present the framework and allow for Q&A.
 - Schedule sessions across departments to ensure broad reach.
- Recorded Webinars
 - Provide on-demand access for those unable to attend live sessions.
- Departmental Drop-In Clinics
 - Offer informal sessions for staff to ask questions and discuss concerns.

3. FAQs and Supporting Materials

- Frequently Asked Questions Document

Cover topics such as:

- What does RM1–RM4 mean?
- How will this affect my current role?
- What are the progression pathways?
- Will my salary change?
- How do I give feedback?
- Role Mapping Guide
 - Help staff self-assess where they fit within the new structure.
- Progression Pathway Overview

Visual guide showing how staff can move between levels.

⁷ [Reimagining HR Partnerships in Higher Education](#)

4. Feedback Mechanisms

- Anonymous Feedback Form

Allow staff to share thoughts or concerns confidentially.

- Focus Groups / Listening Sessions

Engage staff in deeper conversations about implementation.

- Feedback Loop Summary Reports

Share what's been heard and how it's being addressed.

5. Ongoing Communication

- Monthly Updates

Share progress, adjustments, and upcoming milestones.

- Success Stories

Highlight examples of staff who've transitioned or progressed under the new framework.

- Annual Review & Refresh

Revisit the framework based on feedback and evolving needs.

Appendix E

Other Examples of alignment strategies using existing roles and the RM 1 to RM 4 Framework

Use the following structure to classify internal roles according to their level of responsibility:

Table 2: Research Manager Roles (RM1–RM4)

Career Level	Framework Definition	Suggested*⁸ Typical Roles / Titles	Core Responsibilities
RM1 First Stage RM (Entry / Foundational Level)	RM in the first two years (full-time equivalent) of their research management activity who demonstrate the competencies and skills for successful performance in the role. The role requires a basic understanding of the research/business structures and operations and includes responsibility for implementing and achieving results.	Research Support Officer, Pre-Award Officer, Post-Award Officer, Project Assistant, Grants Administrator	Administrative grant support, data entry, basic coordination, compliance checking, and meeting scheduling
RM2 Recognized RM (Intermediate / Professional Level)	RM 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	Research Project Manager, EU Project Officer, Proposal Development Specialist, Research Development Officer, Research Programme Coordinator	Managing research projects, supporting funding applications, financial oversight, reporting, liaising with funders and partners

⁸ These are suggested roles and may not apply to all organisations. However, it is hoped that this will assist with role alignment to RM 1 to RM 4.

	consider broader approaches or consequences through own actions rather than through others.		
RM3 Established RM (Advanced / Expert Level)	RM 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 a 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.	Research Centre Manager, Strategic Funding Advisor, Knowledge Exchange Manager, Impact Manager, Senior Research Development Manager	Oversight of project portfolios, research strategy advice, relationship building with stakeholders, managing research centers or institutes
RM4 Senior RM (Leadership / Strategic Level)	RM 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 is formal responsibility for research/business areas and his / her actions and decisions have a high-level strategic impact.	Director of Research Services, Head of Research Office, Director of Research Development, Head of Research Operations	Setting research strategy, leading research support services, governance and compliance leadership, external partnerships and policy influence

Table 3: Example Role Mapping Matrix Using RM1–RM4

Role Title	RM Level	Key Functions
Research Support Officer	RM1	Grants administration, data entry, pre-/post-award support
Grants / Funding Officer	RM1–RM2	Independent application support, early project delivery
Research Project Manager	RM2	Project lifecycle management, compliance, and reporting
EU Programme Manager	RM2–RM3	Managing complex EU-funded projects, multi-partner coordination
Research Development Officer	RM2	Funding landscape analysis, proposal development support
Strategic Research Partnerships Manager	RM3	Developing funding partnerships, research strategy advice
Research Centre / Institute Manager	RM3	Operational leadership of centers, staffing, and budget oversight
Director of Research Services	RM4	Strategic leadership of research management functions
Head of Research Office	RM4	Research governance, policy development, and institutional strategy

