

A Structured Roadmap for implementation of proposed CARDEA Charter for Research Managers



Authors:

Mary Kate O'Regan CARDEA, UCC

**Dr Radu Plamanescu CARDEA National University of Science and Technology Politehnica
Bucharest**

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Executive Summary

The Proposed [European Charter for Research Managers](#) (ECRM) sets forth a vision for advancing the role of research management professionals across Europe. Recognising the essential contributions of research managers in navigating the complexities of modern research environments, the Charter seeks to provide a cohesive framework for their professional development and recognition. Research managers are instrumental in securing funding, streamlining project execution, and fostering interdisciplinary collaboration, all of which are crucial for the success of the European Research Area.

A key focus of the Charter is to promote the formal recognition of research management as a distinct profession. By establishing a standardised set of competencies and skills, the ECRM aims to create consistency across European institutions, offering clear career pathways and development opportunities for professionals in this field. Furthermore, the Charter emphasises the importance of ethical standards and inclusive practices, underscoring the commitment to diversity and equal opportunity within research management.

The ECRM also supports continuous professional growth through structured training and resources, equipping research managers with the tools needed to adapt to an evolving research landscape. By fostering collaboration across borders, the Charter enables knowledge-sharing and collective problem-solving, reducing redundancy and enhancing efficiency across European research initiatives.

This document serves as a strategic foundation for implementing the Charter's goals, positioning research management as a vital element in Europe's pursuit of research innovation and excellence. Through the widespread adoption of these principles, the Charter aspires to strengthen the profession and support the larger ambitions of the European research community.

Introduction

The Proposed European Charter for Research Managers is a set of core pillars and principles intended to promote the professionalisation and acknowledgement of rewarding careers in research management. Its primary goal is to bolster excellence in research and innovation across the European Research Area (ERA). While aligning with existing frameworks, namely the European Charter for Researchers, this Charter specifically centres on outlining the rights and responsibilities of research managers (RM), employers, funders, and policymakers. It consists of 20 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 the recognition, development, and effectiveness of research management as a critical professional role within the ERA. The RM Charter is a text of reference to reinforce the activity of RMs in research organisations and institutions to support and improve research performance. The best research requires the best support, which means excellent RMs.

Purpose and Scope of the Charter: This charter provides a framework to support and promote the visibility of RMs' 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 creating 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 'research manager' means. RM is an umbrella term which encompasses a wide range of research management roles and specialisations at the "interface of research" under a single classification. It groups together multiple research management roles and specialised experts who share common role objectives and competencies within public and private sector research-performing organisations.

Our definition is:

"Research managers enable, facilitate, and support the performance of research in all its applications. Research managers hold generalist or specialist 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 framework of ERA Action 17 and RM Roadmap, we initiate an inclusive and flexible approach, enabling the reflection of constantly emerging fields and job profiles when defining research management. Thus, RMs can hold roles such as research policy advisors, 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, EDI 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.

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, ethically, and in accordance with strategic objectives. RMs also 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 four pillars:

1. Ethics, Integrity, and Open Science
2. Assessment, Recruitment, and Progression
3. Working Conditions and Practices
4. Research Management Careers and Talent Development

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

1. RMs in all sectors – academia, public, and private organisations supporting research activities;
2. Employers of RMs in the public and private sectors;
3. Funders of research and RMs in the public and private sectors;
4. Policymakers concerned with policies relevant to the Charter for RMs.

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.



HR EXCELLENCE IN RESEARCH

Guidelines for Organisational Implementation Framework for RM Charter.

As part of the CARDEA project's efforts to advance the professionalisation of Research Management, this implementation framework aims to support organisations in preparing to adopt the RM Charter. Modelled after the approach used in the HRS4R (Human Resources Strategy for Researchers - HR Excellence in Research), this framework serves as a tool to help institutions assess their current practices, structures, and policies against the key pillars and principles of the RM Charter as detailed above and can be found [here](#). The results will provide each organisation with a clear understanding of their strengths, areas for improvement, and readiness level for RM Charter alignment. Ultimately, this process will lay the foundation for developing a tailored action plan to support a gradual and effective implementation of the RM Charter. The structure of the implementation framework will reflect the conceptual design of the RM Charter built around the 4 key principals. **The process described below will enable organisations within the ERA to sign up to the Charter for Research Managers.**

Working Groups

As with HR Excellence in Research working groups will play a critical role in the successful implementation of the RM Charter within organisations. These groups provide a structured medium for collaboration, diverse perspectives and ideas leading to a shared ownership of the Charter implementation project. As with HR Excellence in Research CARDEA recommends involving RM staff across all levels of the organisation and senior leadership. Inclusive working groups also enhance transparency, build trust, and increase the likelihood of sustainable action implementation. This approach aligns with best practices in HR Excellence in Research and supports a culture of continuous improvement.

For ideas on how to structure your working group please refer to these [terms of reference](#) for a HR Excellence in Research Working Group which will assist in bringing your working group together.

The Gap Analysis

What is Gap Analysis?

The Gap analysis,¹ in this context is a structured organisational self-assessment process that can be used by research performing organisations to evaluate the extent to which their internal policies, practices, and systems align with the principles outlined in the RM Charter. It identifies areas of full, partial, or insufficient implementation and highlights specific gaps between current institutional practices and the Charter's standards. The process also considers legal or organisational barriers and proposes initiatives to bridge these gaps. Once convened, the Working Group will then start the implementation process beginning with the Gap Analysis.

¹ Adapted from EURAXESS Charter and Code Checklist GAP Analysis

Modelled after the approach used in the HRS4R (Human Resources Strategy for Researchers), an example of a survey for gap analysis helping institutions assessing their current practices, structures, and policies against the key pillars and principles of the RM Charter is given in Annex 1. The structure of the survey reflects the conceptual design of the RM Charter built around the 6 pillars (Ethics, Integrity, and Professional Standards, Rights, Responsibilities, and Accountability, Professional Development and Career Progression, Collaboration, Networking, and Mobility, Working Conditions and Work-Life Balance, Recruitment and Recognition). Each pillar is divided through a series of key principles, which are translated into specific statements or indicators. Respondents are invited to rate their level of alignment or implementation for each principle on a structured scale (1 = strongly disagree to 5 = Strongly Agree).

Internal Gap Analysis Steps

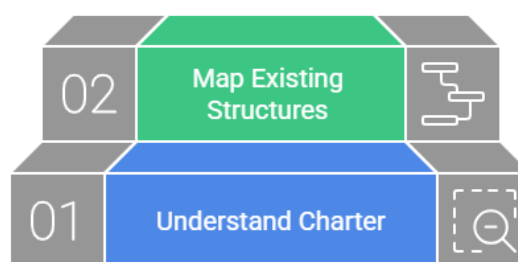
Step 1: Understand the RM Charter

- Review the full text of the **Charter for Research Managers**.
- Identify its **core principles**, such as recruitment, progression, career development, training, and talent development.

Step 2: Map Existing Structures

- Document current RM roles, career pathways, job descriptions, and HR policies.
- You can use the [CARDEA Implementation Framework](#) to assist you.
- Identify any existing frameworks (e.g. RM Comp, CARDEA tools) already in use.

Implementing the RM Charter



Step 3: Compare Against Charter Principles

- Create a comparison matrix:
 - **Column A:** Charter principle.
 - **Column B:** Current organisational practice.
 - **Column C:** Identified Gap
 - **Column D:** Suggested action to improve

Suggested Gap Analysis Template Design			
Charter Principle	Current organisational practice	Identified Gap	Action to improve
Pillar 1: Ethics, Integrity and Open Science			
Professionalism and Integrity			
Upholding Ethical Standards			
Compliance with Regulations			
Open Science			
Pillar 2: Assessment, Recruitment, and Progression			
Clear Definition of Roles and Responsibilities			
Open, Transparent, and Merit-Based Recruitment (OTMR)			
Fair Assessment and Recognition and Reward			
Measuring Impact			

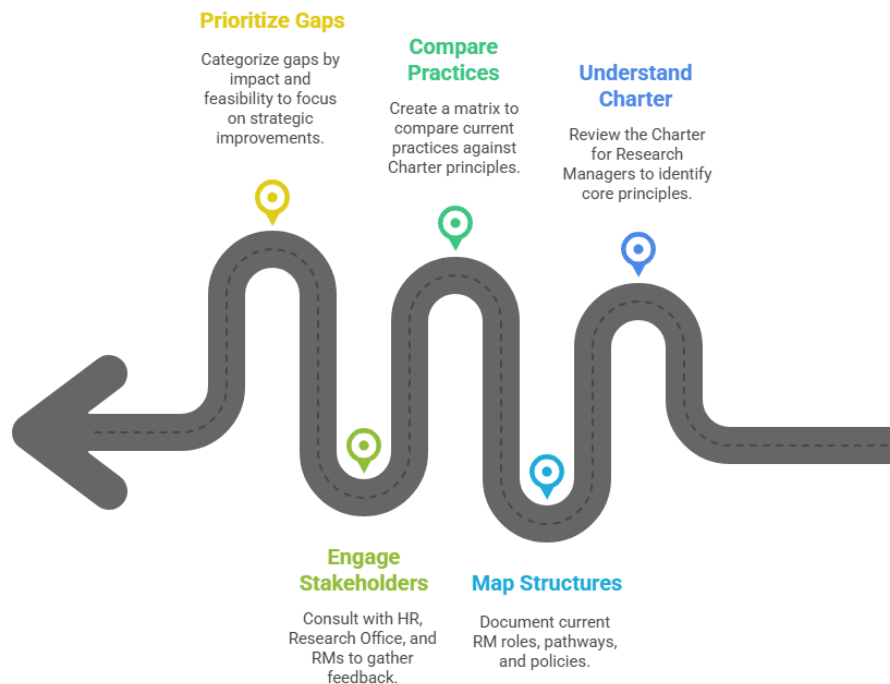
Step 4: Engage Stakeholders

- Consult HR, Research Office, Finance, and current RMs.
- Use surveys, interviews, or workshops to gather feedback on current practices and perceived gaps.

Step 5: Prioritise Gaps

- Categorise gaps by impact and feasibility:
 - **High Priority:** Strategic gaps affecting career progression or recognition.
 - **Medium Priority:** Operational gaps in training or recruitment.
 - **Low Priority:** Cosmetic or documentation-related gaps

Achieving Charter Compliance



The Action Plan

What is an Action Plan?

In the context of this report, an action plan (just like the HR Excellence in Research framework) is a structured document that outlines specific measures an institution can undertake to align its policies and practices with the principles of the Charter for Research Managers. It includes clearly defined actions, responsibilities, timelines, success indicators, and mechanisms for monitoring and evaluation. The action plan is developed following a gap analysis (as above) and serves as a roadmap for continuous improvement in areas such as recruitment, working conditions, career development, and training.

Action Plan Steps

Step 1: Develop Action Plan²

- For each gap, define:
 - **Title Action**
 - **Timing**
 - **Responsible Unit**
 - **Indicator/Target**
 - **Current Status**

² As per HR Excellence in Research [EURAXESS | Researchers in motion](#)

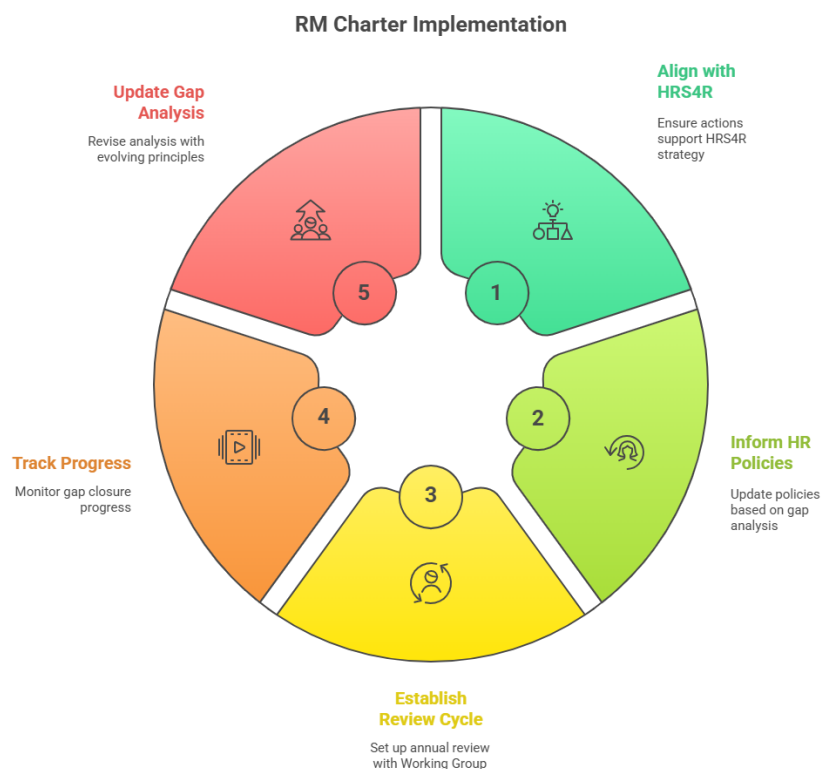
Suggested Action Plan Template				
Title Action	Timing	Responsible Unit	Indicator/Target	Current Status
Pillar 1: Ethics, Integrity and Open Science				
Professionalism and Integrity	May 2026	HR	New Policy	New
Upholding Ethical Standards				
Compliance with Regulations				
Open Science				

Step 2: Align with HR Excellence in Research

- Ensure proposed actions support or enhance your institution’s **HRS4R strategy**.
- Use the gap analysis to inform updates to your HR policies and recruitment practices.

Step 3: Monitor and Review

- Establish a review cycle working with the Working Group (e.g. annually).
- Track progress on closing gaps.
- Update the gap analysis as Charter principles evolve or institutional priorities shift.



Way Forward

Integrating the Charter for Research Managers into the HR Excellence in Research process would be highly beneficial for institutions across Europe. The HR Excellence framework already provides a robust, structured methodology for implementing the European Charter for Researchers, including gap analysis, stakeholder engagement, and continuous improvement. By embedding the RM Charter within this existing policy process, institutions would be positioned to engage with familiar tools and quality structures to ensure consistency of implementation. This alignment would greatly reinforce the recognition of Research Managers as essential contributors to the research ecosystem and enable them through the opportunities that would most certainly develop e.g. training and development and career progression.

Conclusion

The successful organisational implementation of the Charter for Research Managers is inspired by the structured methodology established under the HR Excellence in Research Award. Just as the European Charter for Researchers is operationalised through a rigorous gap analysis and action planning process under HRS4R, the RM Charter would greatly benefit from a similar approach. Institutions that have already embedded HR Excellence in Research principles are well-positioned to quickly adapt and extend these practices to support the recognition, development, and integration of Research Managers. This would help to ensure consistency, transparency, and coherence across research manager roles, reinforcing the broader goals of the European Research Area.

Annex 1 - RM Survey – Internal Review for RM charter implementation

Respondents are invited to rate their level of alignment or implementation for each principle on a structured scale (1 = strongly disagree to 5 = Strongly Agree). (*note: Responses are anonymous, please answer as honestly as you can*)

Part A: Respondent profile

1. Your role/position:
 - Doctoral / early-stage researcher (R1)
 - Post-doctoral / researcher (R2)
 - Experienced researcher / group leader (R3/R4)
 - Technical/administrative/research support staff
 - Other (please specify)

2. Department / Research unit / Centre:
3. Length of service in the organization
 - <1 year
 - 1-3 yrs
 - 4-7 yrs
 - 8-15 yrs
 - >15 yrs
4. Employment status:
 - Permanent contract
 - Fixed-term contract
 - Project-based contract
 - Other (please specify)

5. How do you see yourself in the current position, in terms of Research Manager:
 - First Stage Research Manager (RM1)
 - Recognised Research Manager (RM2)
 - Established Research Manager (RM3)
 - Senior Research Manager (RM4)

Part B: Awareness & communication of RM Charter

Please indicate your level of agreement with the following statements (1=Strongly Disagree, 5=Strongly Agree).

1. The RM Charter process was communicated to me clearly:
2. I feel sufficiently informed about how the RM Charter principles apply to my role:
3. Our organisation provides internal training about the RM Charter
4. (Optional) If you selected 'Disagree' or 'Strongly Disagree', what could improve communication?

Part C: Implementation of the RM Charter & Code principles

For each statement, use 1–5 (1=Strongly Disagree ... 5=Strongly Agree). Select N/A if not relevant.

Ethics, Integrity, and Professional Standards

1. **(Professionalism and Integrity)** Your organization promotes and upholds high standards of professionalism and integrity among research managers in all research management activities.
2. **(Upholding Ethical Standards)** Our organization has clear policies and practices in place to ensure that research management is conducted according to recognized ethical standards.
3. **(Conflict of Interest)** Our organization has established transparent procedures to identify, declare, and manage potential conflicts of interest in research management.
4. **(Compliance with Regulations)** Our organization ensures that research managers are informed about and comply with all relevant legal, financial, and institutional regulations.
5. **(Open Science)** Our organization promotes and supports Open Science principles, including open access, open data, and transparency in research practices.
6. **(Gender, Equality, and Diversity)** Our organization fosters gender equality, diversity, and inclusion across all aspects of research management.

Rights, Responsibilities, and Accountability

1. **(Rights of RMs)** Our organization recognizes and protects the rights of research managers, ensuring fair working conditions and equitable access to professional opportunities.
2. **(Responsibilities of RMs)** Our organization clearly defines and communicates the professional responsibilities expected of research managers in supporting the research process.
3. **(Clear Definition of Roles and Responsibilities)** Our organization provides a clear and transparent framework outlining the roles, responsibilities, and reporting lines of research managers.
4. **(Accountability and Transparent Decision-Making)** Our organization promotes accountability and ensures that decisions related to research management are transparent, fair, and well-documented.
5. **(Freedom to Innovate)** Our organization encourages research managers to apply creativity and innovation in developing and improving research management practices and processes.
6. **(Support for Mobility)** Our organization supports the professional mobility of research managers across departments, institutions, and international contexts as a means of career development and knowledge exchange.

Professional Development and Career Progression

1. **(Training and Development)** Our organization provides access to continuous training and professional development opportunities to enhance the skills and competencies of research managers.
2. **(Career Progression)** Our organization has clear pathways and criteria to support the career progression of research managers at different levels of experience and responsibility.
3. **(Fair Assessment and Recognition)** Our organization applies fair, transparent, and merit-based systems for assessing and recognizing the performance and contributions of research managers.
4. **(Management, Supervision, and Mentoring)** Our organization promotes effective management, supervision, and mentoring practices to support the growth and professional wellbeing of research managers.

Collaboration, Networking, and Mobility

1. **(Internal Collaboration)** Our organization fosters internal collaboration and knowledge sharing among research managers and other research support staff.
2. **(External Collaboration and Networking)** Our organization encourages and supports research managers in building external networks and collaborations at national and international levels.
3. **(Public Engagement)** Our organization promotes public engagement and outreach activities that highlight the role of research management in advancing science and society.
4. **(Promoting Innovation)** Our organization supports research managers in developing and implementing innovative approaches to improve research management processes and outcomes.
5. **(Measuring Impact)** Our organization has mechanisms to assess and communicate the impact of research management activities on institutional performance and research quality.
6. **(Sustainability in Research Management)** Our organization integrates sustainability principles into research management practices, ensuring responsible and efficient use of resources.

Working Conditions and Work-Life Balance

1. **(Supportive Policies for Work-Life Balance)** Our organization implements policies and practices that actively support the work-life balance and wellbeing of research managers.
2. **(Stability of Employment)** Our organization provides stable and secure employment conditions for research managers, promoting continuity and professional development.

Recruitment and Recognition

1. **(Open, Transparent, and Merit-Based Recruitment)** Our organization ensures that research manager recruitment processes are open, transparent, and based on merit, attracting the best candidates.
2. **(Recognition and Reward)** Our organization recognizes and rewards the contributions and achievements of research managers in a fair and transparent manner.

Acknowledgement

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