Identity, skills, and training needs of the European Research Managers: an update from the CARDEA project

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Webinar of CATALISI project

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Call: Horizon Europe - Widening Participation and Strengthening the European Research Area 2021-ERA-01

Coordinator: University College Cork (IE)

Duration: 01/06/2022 – 31/05/2026

Budget: 1.498.312 Euro

CARDEA
Research Managers open Research Doors

Funded by the European Union

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CARDEA: the partners

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GREECE

BELGIUM

CROATIA

POLAND

ROMANIA

ITALY

SPAIN

IRELAND

UNIMC: WP 7 LEADER «TRAINING AND DEVELOPMENT»

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CARDEA

Acronym of: **C**areer **A**cknowledgement for Research Managers **D**elivering for the **E**uropean **A**rea

Cardea was the **Roman goddess** of door hinges and handless who preventing evil spirits from crossing thresholds, protector of children and goddess of health.

Research Managers open Research Doors

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CARDEA: the objectives

- Contribute to the **PROFESSIONALIZATION OF RESEARCH MANAGERS**, by outlining the required skills, career paths, and **CREATING PROFESSIONAL SUPPORT TOOLS** for those who choose this career

- The project intends to contribute to **Action 17 of the ERA policy agenda**

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ERA Action 17

Enhance the strategic capacity of Europe's public research performing and funding organisations

- **Aim**: contribute to improve the European R&I system across the entire ERA, by strengthening the capacity for research management in Europe's public research performing & funding organisations

Research Management Initiative

- **Upskilling**: improve training and skills of research management staff
- **Recognition**: contribute to professionalization
- **Networking**: support best-practice exchange
- **Capacity building**: support less R&I intense regions and organisations

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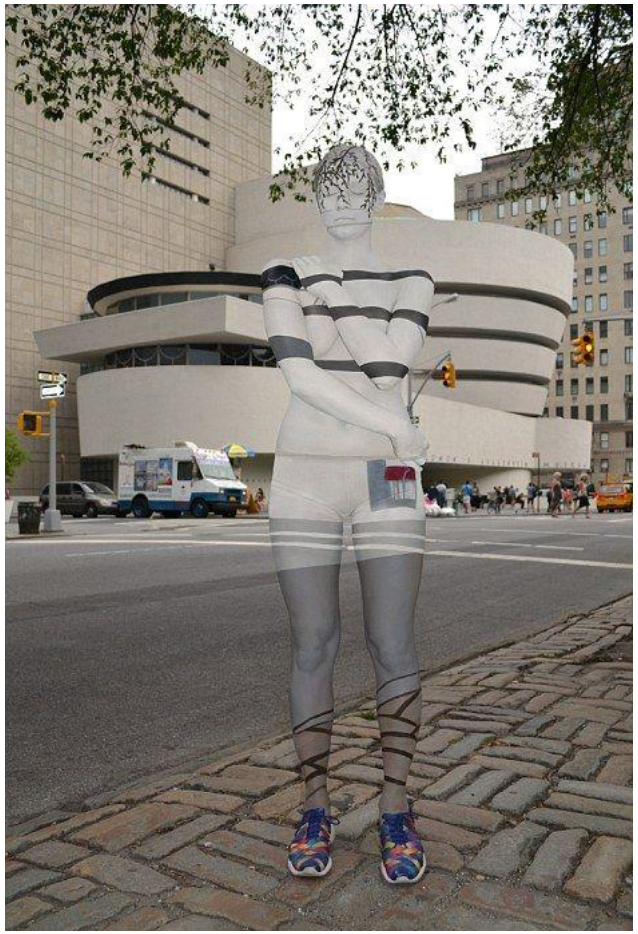
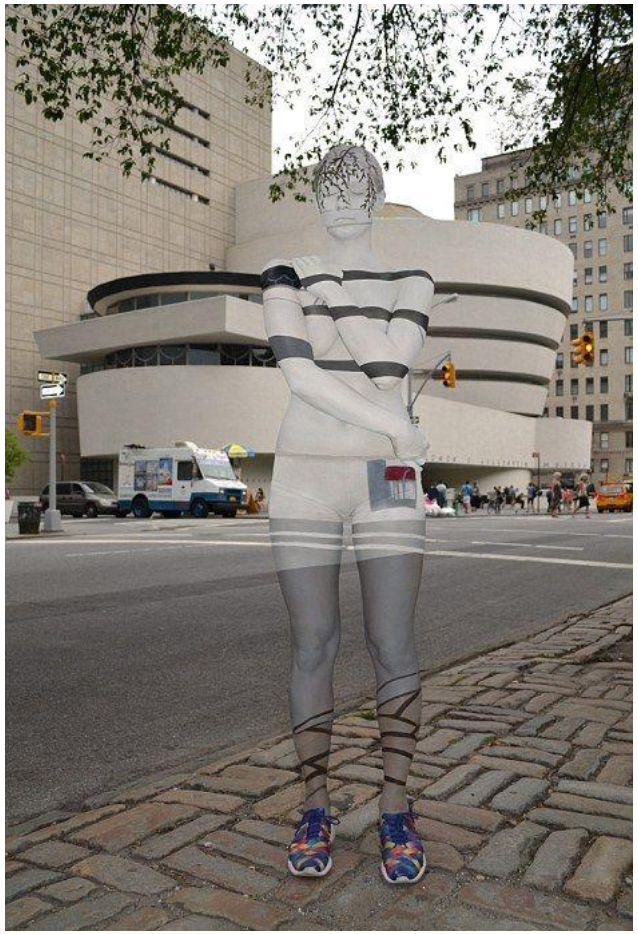
CARDEA: the challenge



- Growing need for high-quality research support and therefore for research managers (RMs)
- Lack of professional recognition of RMs (in terms of career development, policy, visibility…)
- No consistency in salary, skills, competencies and training across the ERA
- Often a position linked to a single grant…
- Strong contrast with researchers' careers.

CARDEA: the expected outcomes

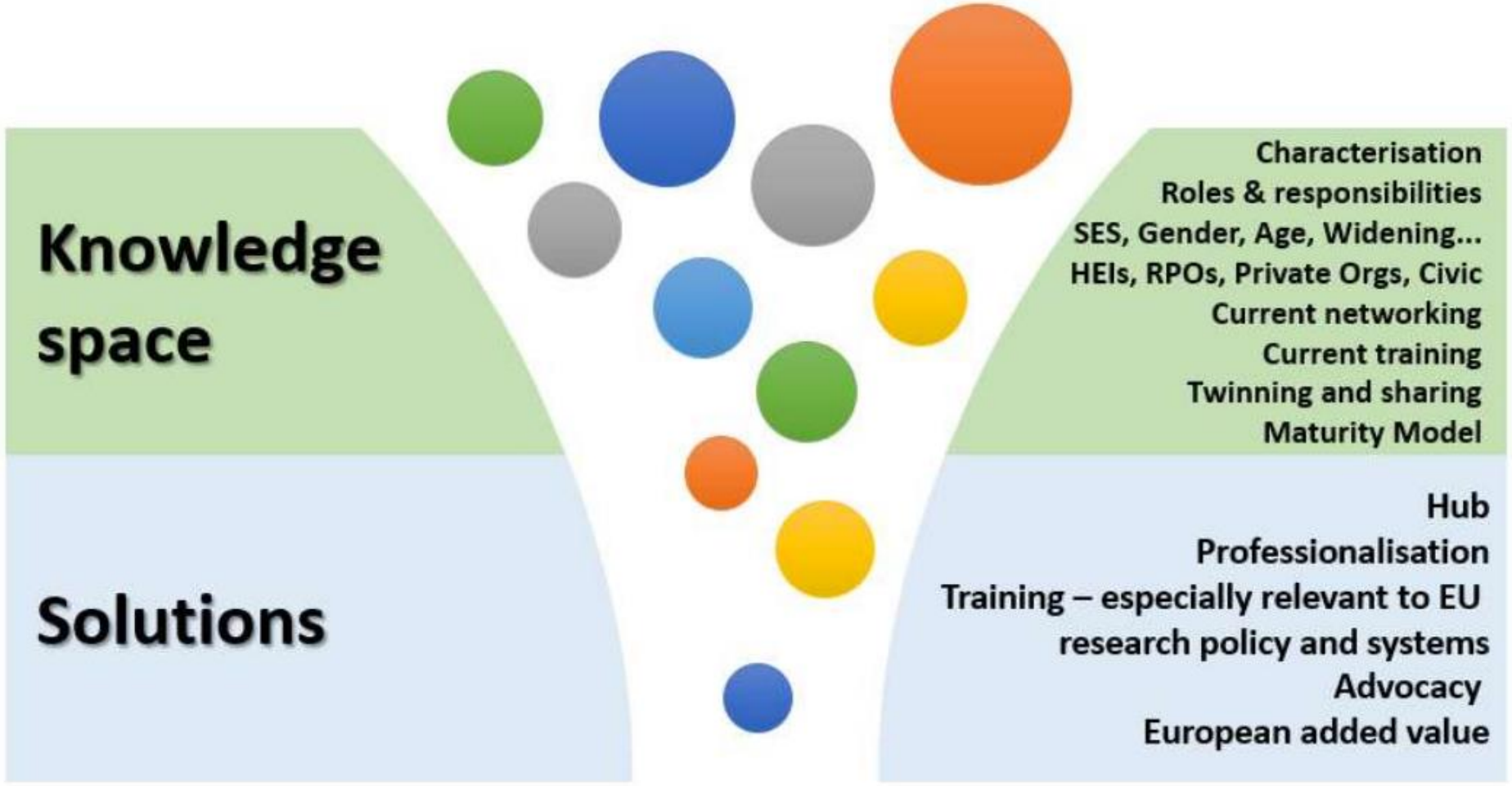


- A collaborative platform (HUB) and a EU community of practice for RMs
- Training Modules
- Toolkits for RMs and their employers (training need analysis, RM competences framework, …)
- RM Charter & Concordat
- Lobbying…

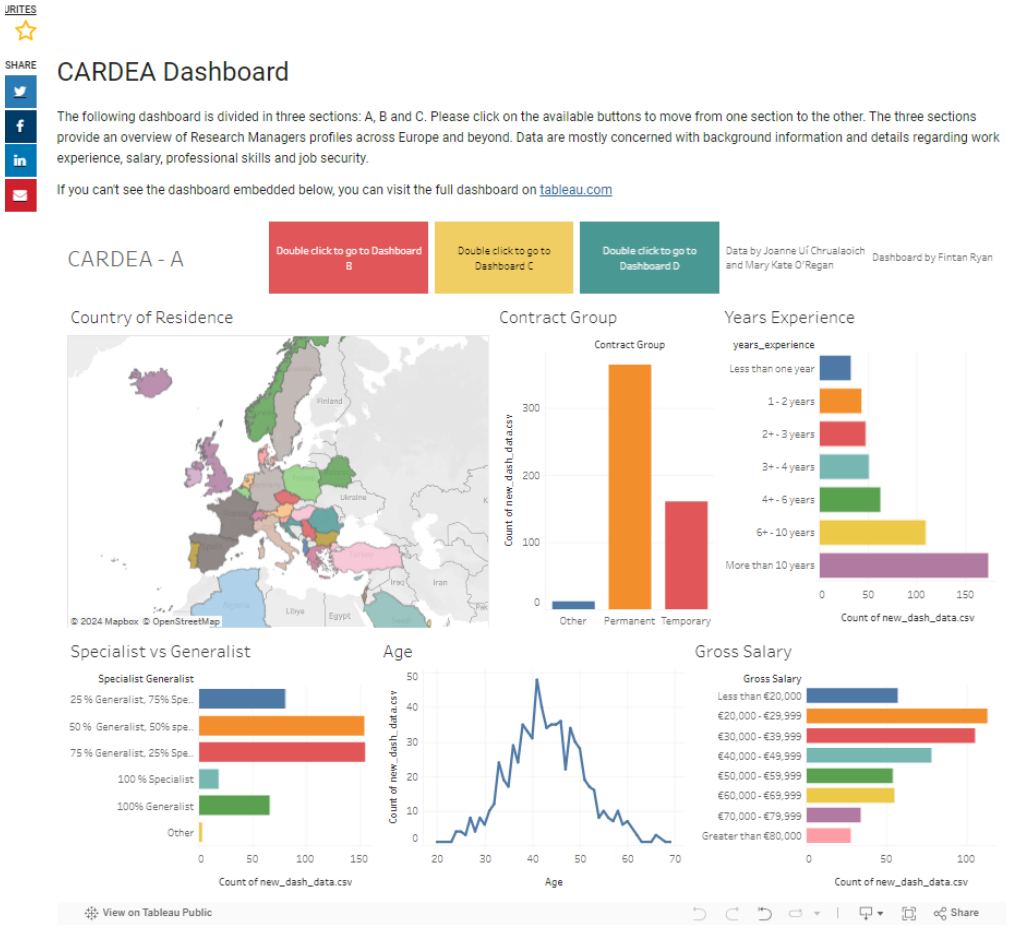
CARDEA: the project

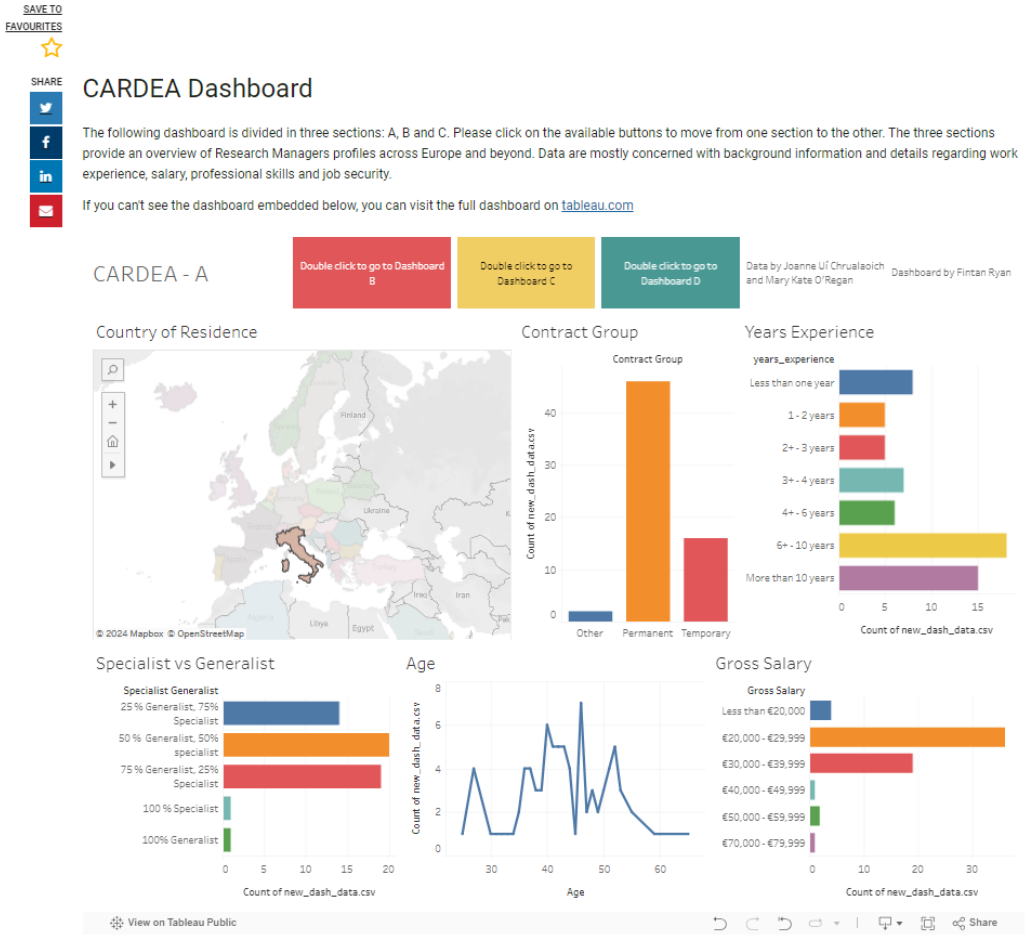
Phase 1

Phase 2



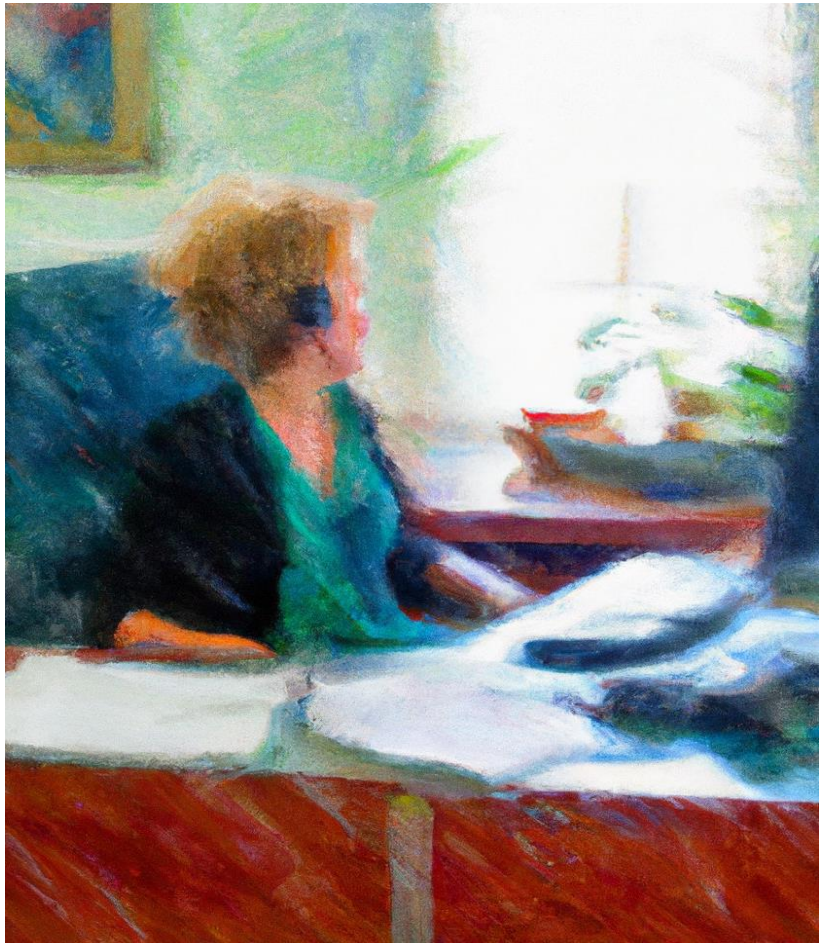
CARDEA: the initial survey





Zenodo. https://doi.org/10.5281/zenodo.7882908

CARDEA survey: who are Research Managers?



855 answers

EU Nationals

86.5%

Female

73%

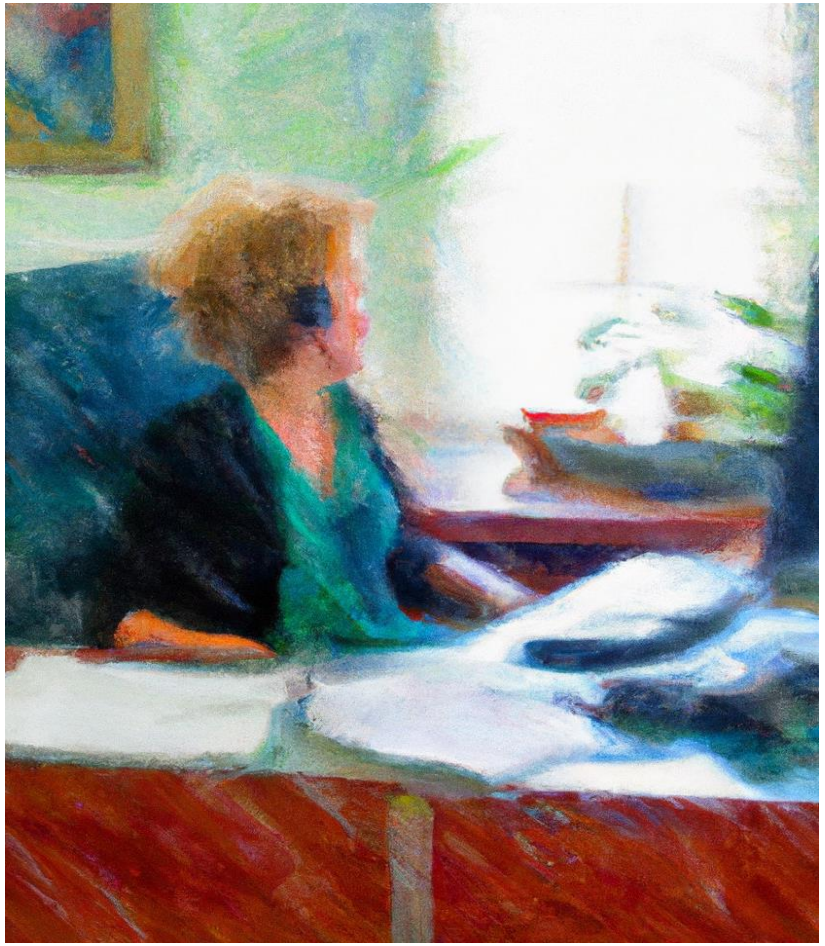
Work and live in country of birth

87.6%

Average age

43 years

CARDEA survey: who are Research Managers?



855 answers

Education

PhD: 53.9%

PhD and Master: 90.8%

Career Path

44.5%

research background

NO Specific RM Qualification

81%

Permanent Contract

66%

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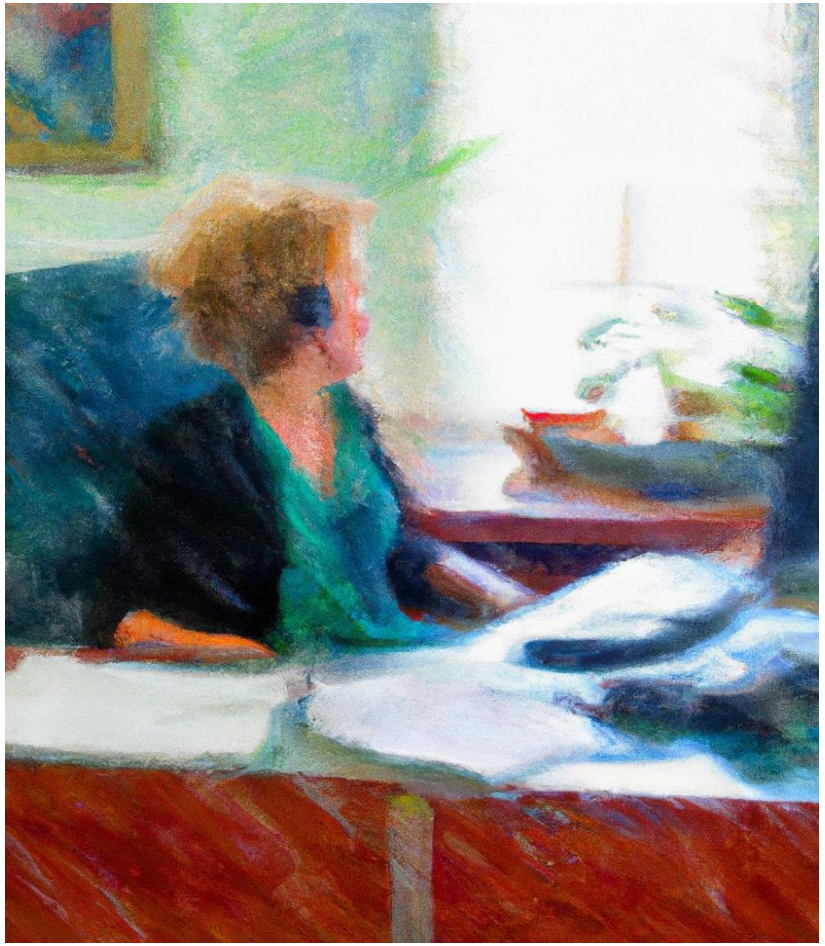

855 answers

Years of experience

Over 10 years: 33%

Over 6 years: 21%

Languages

2 languages: 79.1%

3 languages: 64.4%

4 languages: 36.2 %

Member of a professional RM Association

42.5%

Gross Salary Average

37.600 Euro per year

CARDEA survey: some results

Major part of RMs (74.6%) are satisfied with their jobs, BUT:

- 74% have no prospect of career advancement;
- 50% were never promoted;
- 43% feel invisible and undervalued;
- 50% feel that their organization does not appropriately recognize their contribution to research management;
- In more than 50% of cases the professional role of RMs is not recognized at an institutional or national level.

Zenodo. https://doi.org/10.5281/zenodo.7882908

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CARDEA project: WP7 "Training and Development"

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WP Lead: UNIMC (University of Macerata)

WP team: Barbara Chiucconi, Erica Feliziani, Francesca Spigarelli

WP7 aims to:

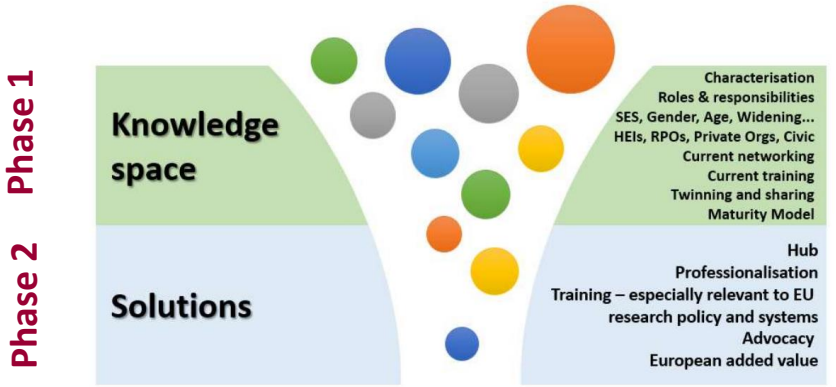
- describe the **existing training ecosystem** for RMs;
- analyse **training needs** of RMs;
- develop a comprehensive **training programme** designed by and for RMs.

CARDEA project: WP7 “Training and Development”

1. **DESK RESEARCH:**
   - mapping training opportunities available for Research managers
   - analysis of surveys targeting Research Managers

2. **FIELD RESEARCH: investigation on “others’ perspectives”**
   - analysis of policy documents mentioning the professional figure of Research Manager
   - interviews to “opinion leaders”
   - survey targeting “RM’s employers”

3. **TRAINING MODULES**



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CARDEA project: WP7 "Training and Development"

mapping training opportunities available for Research managers

WP7 mapped:

- **Certified training** for Research Managers offered by RM organizations across the world
- Training programs for RMs, in some cases differentiated by the level of experience of the participants, albeit not linked to professional qualifications or certifications **offered by RM professional associations and networks**
- **Training projects and initiatives** for Research Managers developed within EU and international projects
- **Main academic training** for Research Managers (mainly in the Anglo-Saxon world)

Results available in deliverable 7.1 in OA on Zenodo: https://doi.org/10.5281/zenodo.1073153

A "dashboard" will soon be created on the CARDEA website to collect training opportunities for RMs 8in collaboration with another EU project, RM ROADMAP)

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CARDEA project: WP7 "Training and Development"

analysis of surveys targeting Research Managers

Analized SURVEYS:

1. **CARDEA**
2. **RAAAP 2016** (Research Administration As A Profession)
3. **RAAAP 2019** (Research Administration As A Profession)
4. **HETFA** (Hungarian Research Institute and Center for economic and social analysis)
5. **EARMA PDRC** (Professional Development and Recognition Committee)

WP7
Deliv 7.1

Main findings:

1. RMs need wide range of skills
2. Importance recognized to soft skills
3. Lack of training opportunities for RMs
4. Preference toward a training relevant to daily work tasks and with a problem-oriented and hands-on approach
5. coaching and mentoring from a more experienced colleague is extremely useful
6. flexibility is a "must-have" for training

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3. **TRAINING MODULES**

CARDEA project: WP7 “Training and Development”

analysis of policy documents

Main findings:

- In the majority of cases, research manager **is not recognized as a profession** by the national legislation **nor funded explicitly** by research funders.

- However, the analysis of recent policy documents initiated by WP7 reveals that RMs **are not so “invisible” as they used to be:**

    - e.g. in the WIDERA work programme, it is **explicitly recognized** that entities who are strong in research performance rely on a **strong community of RMs**, while lower R&I intense countries, regions, institutions often lack such communities

    - e.g. in Italy into the National Research Strategy, RMs are described as the ones who **connect the dots of the worlds of science and of business**, promote and support the **twin transitions**, accompany the transition to an **open science and open innovation** approach

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CARDEA project: WP7 "Training and Development"

interviews to "opinion leaders"

- 1 hour interview with each of the **7 selected OPINION LEADERS**
  - experts of the ERA principles and the research process
  - members of the ERAC Standing Working Group on Human Resources and Mobility (SWG HRM)
  - experts that are participating in the review of C&C

- **Aim:** deepen what the real expected skills for RMs are, with the ultimate goal of shaping training modules for RMs based on researchers' needs

CARDEA project: WP7 “Training and Development”

interviews to “opinion leaders”

Main output:

RM IDENTITY/ROLE/SKILLS

- It is challenging to have a definition since there are so **many varieties of roles and tasks**
- People that **enable – not support (ancillary connotation)** - the entire (pre-award, post award, techtrasf) cycle of research.
- Definition of RM using words from the semantics of the **"relation"** i.e. “connectors, mediators, facilitators, coordinators, intermediaries, communicators, problem solvers, “stakeholder's managers”, “gaps fillers”, “knowledge brokers”;

HOW TO ACKOWLEDGE THE PROFESSIONAL FIGURE OF RM?

- It is **not good to link the profession of RM to the one’s of researcher**: RMs need their own framework and career path
- Need to **increases awareness** of this new profession
- Need to **build evidence** to proof the value of RMs es % and amount of grants obtained

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3. **TRAINING MODULES**

WP7 “Training and Development”
survey targeting RMs’ employers

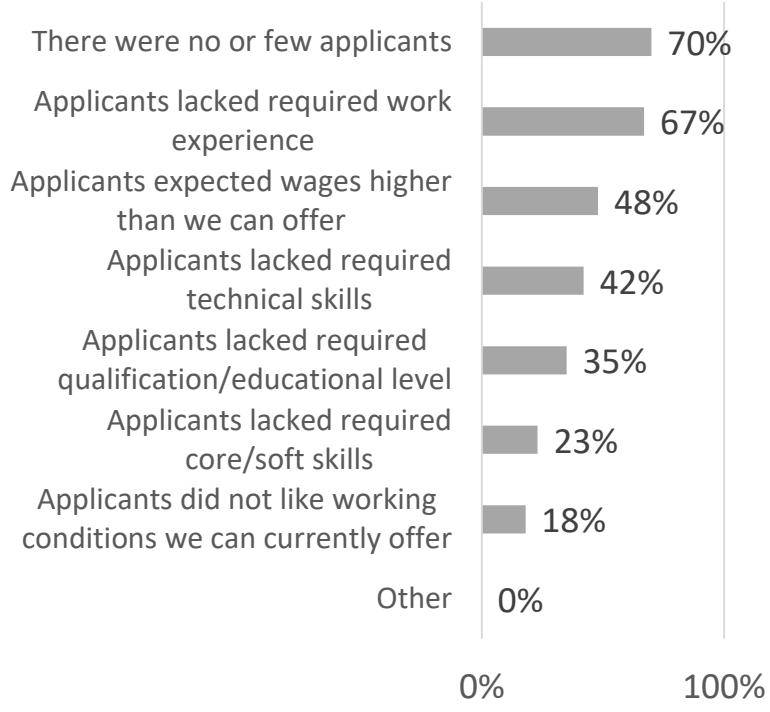
METHODOLOGY:

- **TARGET GROUPS:**
  - not mass mailings to all RMs, but only to those involved in the RMs selection processes (including HR office staff)
  - have EU geographical coverage with all MSs represented
- **QUESTIONS OF THE SURVEY:**
  - according to CEDEFOP guidelines (a EU Center that monitors the emerging needs of the labor market and provides guidance for those who develop training courses for new workforce)
  - Developed to have comparable results with other surveys (e.g. the same questions asked in other surveys were repeated to different target groups in order to have different perspectives)
  - Few questions to have a short questionnaire (max 30 questions, 5 minutes)
  - 3 sections:
    - info on the organization and who responded,
    - questions about the selection process
    - questions about «workforce development»

WP7 “Training and Development”
survey targeting RMs’ employers

125 answers from all EU Member States

What problems did your institution encounter during RMs’ recuitment?



If you mentioned that some applicants lacked the necessary skills, could you please indicate skills were lacking?

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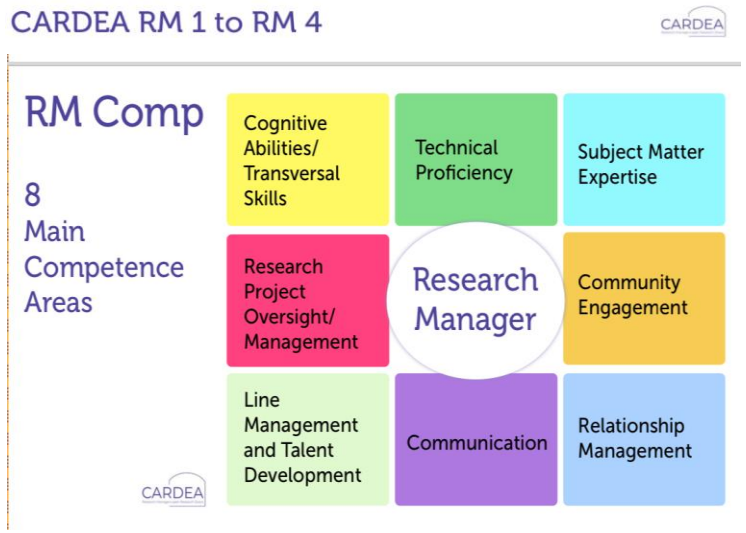
WP7 “Training and Development”
CARDEA training modules

Main features:

- **Targets:** only RMs, mainly (not only) new comers.
- **Format:** 16 free on-line webinars. Link to the subgroups of the CARDEA community of practices, that will act as a sort of mentorship programme.
- **Content:**
  - the training modules will be a comprehensive training covering the main topics of RM profession;
  - a RM could attend the whole package of training or select only the content of interest;
  - the modules will pay a specific attention to the role and professional identity of RM;
  - some training modules will focus on soft skills;
  - an innovative module on “How to embed the Human Resources Strategy for Researchers (HRS4R) in the overall research management”
- **Trainers:** CARDEA partners
- **Certification:** micro-credentials and open badge
- Link with the **CARDEA RM COMPETENCES FRAMEWORK**

CARDEA Research Managers FRAMEWORKS



Career Stage: RM1-RM4

1. First Stage Research Manager
2. Recognised Research Manager
3. Established Research Manager
4. Senior Research Manager

672 learning outcomes along **4 proficiency levels:**

1. foundational,
2. intermediate,
3. advanced,
4. expert

Includes **8 main competence areas**:

1. Cognitive Abilities/Transversal Skills
2. Technical Proficiency
3. subject Matter Expertise/Specialised Knowledge
4. Research Project Oversight
5. Community Engagement
6. Line Management and Talent Development
7. Communication
8. Relationship Management

In the CARDEA Competences Framework, it is not envisaged that Research Managers acquire the highest level of proficiency or have the same proficiency across all the 8 competency areas. However, Researcher Managers should develop their skills in all 8 competency areas where possible.

We would welcome any feedback on the proposed Framework. Please email your comments to Cardea@UCC.ie or CARDEA.Research.Managers@gmail.com

Get involved

- Visit the CARDEA website and have a look to the:
  - Data and report survey: https://www.ucc.ie/en/cardea/knowledgespace/
  - RM Competences Framework draft https://www.ucc.ie/en/cardea/knowledgespace/
  - Other available resources https://www.ucc.ie/en/cardea/researchmanagertraining/

- Soon:
  - Attend CARDEA training modules
  - Take part to the CARDEA HUB and the community of practices for RMs