RM FRAMEWORK

D3.1 – Detailed pilot testing approach.

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This document outlines the detailed pilot-testing methodology that accompanies the draft of the RM Framework Handbook, provided by WP1 lead team (CHE and ZWM), as well as questions regarding the quality label provided by WP2 lead team (EARMA).

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D3.1 – Detailed pilot testing approach.

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List of Abbreviations

AGAUR	Agency for Management of University and Research Grants (Catalonia – Spain)
CDTI	Centre for the Development of Industrial Technology (Spain)
CHE	Centre for Higher Education (Germany)
EARMA	European Association of Research Managers and Administrators
ERA	European Research Area
ESA	European Space Agency
FECYT	Spanish Foundation for Science and Technology (Spain)
GDPR	General Data Protection Regulation
HEI	Higher Education Institutions
NARMA	Norwegian Network for Administration and Research Management (Norway)
NFR	Norwegian Research Council (Norway)
NKFI	Hungarian National Research, Development, and Innovation (Hungary)
R&D&I	Research and Development and Innovation
RI	Research Infrastructure
RM	Research Manager/ Research Management
UHR	Norwegian Association of Higher Education Institutions (Norway)
UiA	University of Agder (Norway)
UiB	University of Bergen (Norway)
UiO	University of Oslo (Norway)
UNIMIB	University of Milano-Bicocca (Italy)
UPF	Universitat Pompeu Fabra (Catalonia – Spain)
UPM	Technical University of Madrid (Spain)
URV	Fundació Universitat Rovira i Virgili (Catalonia – Spain)
WP	Work package

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ZWM	Center for Science and Research Management (Germany)

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1. Executive Summary

This document outlines the detailed pilot-testing methodology that accompanies the draft of the RM Framework Handbook, provided by WP1 lead team (CHE and ZWM), as well as the key elements of the draft RM Framework Quality Label provided by WP2 lead team (EARMA).

It is designed as a structured and guided resource for pilot-testers, supporting their interaction with this version of the handbook while enabling the systematic collection of their feedback (including indicators and reflections), required by WP1 to refine, validate and shape the final version of the handbook, due Q4 2026.

This methodology, designed in a multi-phased manner, considers previous co-creation efforts, including pre-pilot meetings to map existing training offers by pilot-testers, collective co-creation workshops and meetings. Proposed as a reflective and practice-based guide, participants are invited to retrace the original design logic of their existing training programmes, documenting usability, alignment and contextual adaptations.

In parallel, the pilot offers an opportunity to test selected components of the RM Framework Quality Label, a developmental and proportionate reference model to support transparency, coherence and interoperability of RM training across Europe. The pilot focuses on assessing clarity, feasibility and proportionality of the label's criteria and tools.

The next step of this process will consist of individual follow-up meetings for further discussion and final reflection, where feedback gathered will inform WP1 and WP2 (*with regards to the quality label*) teams to support a final, interoperable, and practically relevant pilot testing approach and handbook for Research Management training design, sustainability and implementation across Europe.

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2. Introduction

Pilot testing is a core output of the RM Framework project, intentionally designed as a learning, evaluation and co-creation process rather than a standardisation exercise. It supports the refinement of the RM Framework Handbook (WP1) and tests the feasibility and usefulness of a future European Quality Label for Research Management (RM) Training (WP2). Building on extensive prior work (including RM Roadmap project, CARDEA project and key outputs, including European Competence Framework for Research Managers published by the European Commission – RM Comp), the project moves from defining *which* competences and areas exist, towards providing a new guidance on *how* these can be translated into practical and adaptable training designs. Early pre-pilot individual meetings with the participating pilot testing institutions mapped existing training offers, local constraints, strengths, sustainability models, and historical feedback. These insights, together with a series of handbook workshops and a pilot-testers meeting held in Budapest in October 2025, were crucial building blocks for drafting the handbook.

With the handbook draft made available, pilot-testers enter the next stage: structured engagement with, and practical application of this framework, guided by this document. They are invited to apply key chapters to reflect on their existing trainings, record their experience through questions, structured exercises, and a learning-diary approach, and provide detailed, contextualised feedback. This evidence will be complemented by individual follow-up meetings to further discuss their interaction, and all collected information will be shared with the WP1 lead team. Parallel to this, pilot-testers will also contribute to the consolidation of the quality label, by answering different questions regarding this subject that will be shared with the WP2 lead team.

Ultimately, this methodology is designed to support the refinement of the handbook as a useful resource: a shared language and interoperable toolkit that empowers training providers and Research Managers, that represents and respects the diversity of the practices across the community, and strengthens the recognition, sustainability and professionalisation of the Research Management field throughout Europe.

2.1. Overview of the handbook

The RM Framework Handbook responds to a clearly identified need within the European Research Area (ERA) to establish a shared language and a stronger professional foundation for Research Management. Evidence from across Europe shows the diversity in how RM roles are defined, supported and trained within institutions throughout Europe. The handbook therefore aims to provide a coherent, practice-oriented guide for training providers (e.g., HEIs) to design and implement high-quality, competence-based RM training programmes. By offering harmonised terminology, modular tools, illustrative examples and targeted guidance, the handbook supports the professionalisation of Research Managers, empowers individuals and organisations to strengthen their capacity, and promotes interoperable, sustainable training practices aligned with broader European standards and policy objectives.

2.2. Overview of the quality label

For the purposes of the pilot, the RM Framework Quality Label is being explored as a developmental, and proportionate reference model to support Research Management training across the ERA. It provides a shared European structure for reviewing and strengthening RM training programmes through a structured self-assessment aligned with RM COMP and the RM

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Framework Handbook. It is intended as an adaptable tool that can promote transparency, internal coherence, and continuous improvement across diverse contexts. The pilot phase will help determine which elements of this model are feasible and appropriate for any long-term implementation.

As part of the pilot, institutions will also reflect on the Implementation Guideline and the Preliminary Promotion Plan, which aim to test whether the Quality Label's purpose, developmental logic and supporting materials are communicated clearly and provide proportionate guidance to different training providers.

2.3. Pilot-testing Partners

One of the most important design choices for the pilot testing phase was to ensure broad diversity among the participating institutions – they should represent different organisational types, should be located in diverse European countries, should have different scales of experience in designing training programmes, and target the diverse roles that build the RM community.

Research Management is not a narrowly defined single function. It encompasses a wide range of professional roles, from pre-award and post-award officers, research infrastructure managers, innovation and business development officers, data stewards, open science officers, knowledge and technology transfer teams, as well as many hybrid roles that combine administration, strategy, and external engagement. In addition, Research Managers also work in diverse research performing contexts, from private and public universities and research institutions, funding agencies, NGOs, and even public authorities[2]. So, it was key to reflect this diversity in the pilot-tests.

Selecting pilot-testers followed a strategic and inclusive approach, drawing from a broad pool of organisations with established training offers and prior involvement in European Research Management-related initiates, whose experiences could collectively support a credible and diverse test (further information see Chapter 3.)

The *first wave* of pilot-testers include:

Universities

Budapesti Corvinus Egyetem (Corvinus University of Budapest), Hungary

Universidad Politécnica de Madrid – UPM (Technical University of Madrid), Spain

Università degli Studi di Milano Bicocca – UNIMIB (University of Milano-Bicocca), Italy

Funding agency

Agència de Gestió d'Ajuts Universitaris i de Recerca – AGAUR (Agency for Management of University and Research Grants), Catalonia – Spain

Professional network

[2]RM Roadmap Final Report D1.2. https://static1.squarespace.com/static/633ae0b47dc8ac471e5978a9/t/6878ba2e8464c26f256d9743/1752742449508/RM+Roadmap_D1.2_HETFA_Report+on+ERA-wide+landscape.pdf

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Norwegian Network for Administration and Research Management – NARMA, Norway

3. Mapping of pilot-testers' training offers

The process started by mapping the existing and planned training programmes that pilot-testers intended to take part of this phase, to develop a common methodology.

Designated representatives from each pilot-testing partner participated in one-to-one, semi-structured (online) meetings, during the summer of 2025. Each meeting lasted between 45 minutes to one hour and followed a common protocol: a short presentation on the status of the handbook (including prior WP1 feedback), presentation of a pre-pilot interview topic list (see 3.2.), followed by an open discussion in which participants could expand on these topics. Notes were taken during the session, and the topic list was made available to participants after the meeting. A concise written meeting summary highlighting key information based on the notes taken was drafted and shared with each respondent for review.

All interview summaries were reviewed and approved for publication by the interview partners.

3.1. Key topics of the pre-pilot one-on-one meetings

1. Current training portfolio: Programmes & Modules (i.e., titles, hours, structure, certifications, assessment methods) Mobility, mentoring and collaborative elements (e.g., shadowing, multi-institutions collaborations)

2. Local Context & Constraints: Language, Academic calendars, legal/regulatory frameworks, Digital infrastructure and resource availability

3. Historical Feedback: Participation satisfaction scores, strengths & improvement areas

4. Sustainability & Adoption: Ease of integrating changes, Long-term support and resource implications

5. The Institution's motivation & expectations: Goals for participating in the pilot success criteria and desired outcomes (how would you compare the handbook? And how will you judge the pilot's success?)

3.2. Pre-pilot testing one-to-one meetings' summaries

3.2.1. Universidad Politécnica de Madrid: meeting with Prof. Roberto Martinez

Current Training Landscape

The course that will be used for the pilot-testing is the ***Diploma de Experto en Promoción y Gestión de Proyectos y Actuaciones Internacionales de I+D+I (European Research Manager)***, coordinated by the Universidad Politécnica de Madrid (UPM) and promoted by UPM's Oficina de Proyectos Internacionales de I+D+I. This is a post-graduate diploma, blended format (50/50, excluding on-site visits), and includes visits to the European Commission Representation in Madrid, European Space Agency's (ESA) Cebreros Station and other relevant research centres and innovation hubs. The programme started in 2008 at the initiative of key government bodies (i.e., the Spanish Ministry of Science and Innovation), together with the Centre for the Development of Industrial Technology (CDTI) and the Spanish Foundation for Science and Technology (FECYT), to strengthen Spain's participation in EU Framework programmes and secure more European strategic funding. CDTI and FECYT co-support this

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programme by providing financial support that reduces tuition fees for admitted students, and by also providing input into course design and contribution as speakers. Because the university mandates a minimum quota (~30%) of UPM faculty, together with guest lecturers from industry and governmental bodies, the course model effectively restricts participation from other universities. Additionally, this programme does not offer a mobility scheme to its participants, although 1/3 of the students come from regions outside of Madrid. The participant profile is mainly Research Managers from Spanish R&D&I support offices, usually at the [3], but also RM1 and 3, that are endorsed from the applicant's home organisation. The programme is divided into four modules, threeof which are assessed by individual examinations, and one assessed in a team assignment including the preparation of proposals by real evaluators.

Local Contexts & Constraints

The duration of the programme is usually from February to June, (Thursdays afternoon and Fridays all day) which sums up to around 75 hours of lectures, practical assignments and on-site visits, on a bi-weekly basis, in a blended format (50/50, online and at UPM). The course is taught in Spanish with slide decks and module contents in English, and the proposals can be prepared in English or Spanish.

Historical feedback

At the time of the interview, this programme is in its 16th edition with a total of over 600 students enrolled and enjoys overwhelmingly positive feedback (alumni evaluation average score of 9/10, conducted by the training provider). According to the interview partner, alumni's occasional criticism comes from those who work already in a core area of the programme, finding the other areas overly lengthy. Additionally, occasional alumni who consider certain topics outside their core interest (e.g., different research domain) and therefore regard those topics as less useful. Previously, but not currently, the evaluation surveys were also shared with CDTI, for their internal assessment. Participants consistently highlight the programme's strengths in fostering professional networks, capacity building, and access to the most relevant experts and institutions.

Sustainability & Adoption

Every year, in September, the team meets to prepare the content and outline for next year's edition of the programme. The active involvement of governmental bodies in the shaping of every edition of the programme leads to the content being regularly altered to cater to the latest priorities and viewpoints of national agencies. This involvement also points to their commitment to providing long-term financial support. There is around 10% of the curriculum being revised for every edition, including updates to the modules' content and lecturers invited.

The Institution's motivation and expectations

The primary motivation of UPM's designated representative for joining the pilot testing of this Framework is to secure a prospective European quality label. As a success criterion for the pilot phase, besides the fit between the handbook with their course, they also aim to build connections with European-level institution (e.g., EARMA, European Commission, other leading organisations), identify prospective partners and shareable tools or curricula online, and ultimately integrate the course under a recognised quality seal.

[3] RM proficiency levels (1-4: foundational, intermediate, advanced and expert), RM Comp framework report (see references).

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3.2.2. Norwegian Network for Administration and Research Management (NARMA): Meeting with Dr. Hiwa Målen.

Current Training Landscape

The course that will be used for the pilot-testing is the ***NARMAs kompetanseprogram (NARMAs Professional Development program)***. This programme emerged directly from "Path to EU Excellence", a joint initiative of NARMA and the Norwegian Research Council (NRC), which began in 2016/17 to boost EU-project competence across Norwegian institutions. A Competence Development Project ran from 2017-2019, financed by the NRC, where the first introductory, advanced, and leadership courses were piloted in multiple cities with participants from across different HE-institutions in Norway. The programme comprises three levels according to increased experience and responsibilities in RM: Introductory course (Beginner: ≤3 years of experience); Advanced course (Intermediate: >3 years of experience) and Leadership Seminar (for heads of support units; strategic leaders). Although a mentoring scheme was originally planned for entry-level participants, it was never implemented; instead, participants rely on the strong networking opportunities the programme offers. For advanced-level participants, formal mentoring is viewed as unnecessary. The programme runs in an in-person format and geographically distributed, meaning that the courses and seminars rotate among different universities and regions to maximise national reach. Taking advantage of this rotation, the programme engages local faculty and guest speakers from each host institution. NRC funding is paid directly to each host institution of the NARMA's team to cover roughly 10% of the core team's working time in the programme, plus 15% working time for a dedicated support staff member to handle administrative support, and fees to cover networking activities and representation. In addition, the programme is funded partially by participant fees to cover direct costs for the in-person courses (meeting room, board and lodging etc.).

Local Contexts & Constraints

Both Courses (Introductory and Advanced) run for 4 days each (2 two-day sessions separated by approx. two months, with assigned work in between). The leadership seminar is a lunch-to lunch meeting, with no assignments. The courses have usually around 25 participants each and the seminar 45, in an in-person format. The courses and seminar are usually delivered in Norwegian (except when invited lecturers who do not speak Norwegian), with slide decks and module contents in English. The assignments can be prepared in English or in Norwegian. The overall language distribution reflects roughly a 40:60 split between English and Norwegian.

Historical feedback

The programme is in its 7th year running, including its initial pilot in 2018. Participants' feedback has been consistently positive throughout its running (constantly scoring 4-5 out of 5).

Participants particularly appreciate the networking opportunities and the competitive edge they feel they gain from sessions delivered by leading experts and key stakeholders (e.g., Representatives from national government, policy officers at the European Commission, and from EARMA and the CARDEA Project). In the evaluations, participants have also consistently expressed high satisfaction with the relevance of the courses, particularly in relation to their own professional tasks and role in RM. As far as negative feedback goes, participants occasionally noted that certain speakers or sessions did not fully meet their expectations or failed to cover the content as outlined.

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Sustainability & Adoption

The permanently dedicated team composed of experts from several institutions (University of Bergen, University of Agder, University of Oslo, and The Norwegian Mapping Authority) is actively involved in designing the courses and the leadership seminars as well as selecting the locations where the courses take place and the speakers involved. A Steering Reference Group with representatives from NARMA, the NRC, the Ministry of Education and Research, the Universities Norway (UHR) cooperative body and an observer appointed by EARMA, also provides guidance and feedback to the programme outline. Each edition updates around 30-40% of the curriculum, with the occasional addition of entirely new modules (e.g., modules addressing the challenges and benefits of AI for RM). Fast-moving topics, like EU economics or policy, are updated more frequently, while areas such as soft-skills or project management remain largely stable.

The Institution's motivation and expectations

By taking part in the project and its pilot-testing phase, NARMA hopes to stay informed of developments across the EU research management landscape and remains attentive to emerging needs and trends. Piloting the handbook will help NARMA in understanding how other training providers operate, identify synergies and potential enhancement. The quality label provides a recognised "stamp of excellence" providing external validation and recognition from fellow organisations and other countries. Another key expectation is that the state of the art remains up to date via a dedicated portal or resource hub, to maintain the handbook as a genuine living guide.

3.2.3. Corvinus University of Budapest: Meeting with Prof. Éva Kőváriné Ignáth, Dr. Krisztina Hollósi, Prof. Éva Pintér.

Current Training Landscape

There are different courses that will be included in the pilot-testing***: the Kutatási és innovációs menedzser/szakközgazdász (Economist in Research and Innovation Management) Executive Programme***, a two-semester (one academic year) programme with an in-person format, leading to a second (másoddiploma) qualification diploma; and ***two elective courses at BA level ("Research Management as a Profession in the EU ecosystem") and one compulsory elective course on MA level ("Research Funding and Implementation in the EU Ecosystem")***.

The executive programme started as a pilot course in 2020, and its success demanded a fuller postgraduate specialisation. This programme was driven by the Hungarian National Research, Development and Innovation (NKFI) Office to strengthen Hungary's innovation ecosystem. The elective courses were originally developed in the consortium under the Erasmus+ foRMAtion project (2019-2022). The executive programme's evaluation combines exams during each module with a final thesis in the second semester. Based on a topic selected in advance, participants develop an innovative project during the course of the programme, working under an assigned mentor.

At bachelor's level it is offered as a free-elective and open to students from any programme or year, and at a master's level, is a compulsory elective course within relevant Master of Science degrees (e.g., International Economy and Business). The former being broader with an

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overview of the EU research funding landscape and basis for proposal writing, and the latter being more in depth into these matters, including project lifecycle management and stakeholder engagement. For the elective courses, students complete written assignments (e.g., research-plan proposal) and earn points throughout the weeks for team assignments and problem-solving tasks directly to their projects.

Local Contexts & Constraints

This executive programme is aimed at intermediate/advanced level RM professionals, meeting twice a week (Friday evenings and Saturdays) in an in-person format for a two-semester duration. The entire curriculum, including lectures and supporting materials, is delivered in Hungarian, with the teaching faculty predominantly from Corvinus University's own academic staff and invited lecturers from industry and governmental bodies. The executive programme is limited to 20 participants. Additionally, each year, the executive programme hosts a dedicated workshop, bringing together alumni to explore current topics and strengthen professional connections, compensating for Hungary's missing national RM official network. As for the elective courses, for undergraduates, the elective course runs as a 12–13-week module with one 90-minute class per week. At a master's level, the course is delivered over the full semester in two 90-minute classes each week. The language of the elective courses and the compulsory elective course is English.

Historical feedback

All sessions are evaluated post-course, and participant feedback, both for the executive programme and the elective courses, has been overwhelmingly positive, with no negative comments or suggestions for improvement shared.

Sustainability & Adoption

The Executive programme leader designates the courses coordinators and lecturers who, together with the Head of Institute, design and regularly refresh the executive programme's curriculum. There is also the active contribution of expertise and guidance by the NKFI Office, as well as the Ministry of Innovation and Technology, and the Hungarian Innovation Association to the programme. For the elective courses, their coordinators, supported by the Institute for Global Studies and the Research Management Office, ensure content remains updated and aligned with standards.

The Institution's motivation and expectations

By piloting the handbook and the quality label, Corvinus designated representatives seek hands-on, quantifiable skills development for their trainings, expanded interdisciplinary expertise, enhanced networking, and strengthen international collaboration. They also aim to benchmark against EU best practices, fine-tuning their own curricula, and to secure the quality label as a mark for business and academic excellence.

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3.2.4. Agència de Gestió d'Ajuts Universitaris i de Recerca – AGAUR: Meeting with Dr. Cristina Borràs Sardà and Dr. Regina Arquimbau Ibañez.

Current Training Landscape

The course that is going to be used for pilot-testing is still under development, scheduled to begin in January 2026, and it is being built upon two previous editions of the training programme: ***Formació en Gestió de Projectes Europeus de R+D+I***, a combined effort of AGAUR, the Fundació Universitat Rovira i Virgili (URV) and the Universitat Pompeu Fabra (UPF). This course (including the first editions) is aimed at early-entry RM professionals (up to 2 years of experience) working in the region of Catalonia. The main difference between the previous editions and the forthcoming one is that the programme is now split into two courses (pre-award and post-award), which participants can take independently or in combination according to their needs and earning a dedicated micro-credential for each. Just like the previous editions, the course will maintain a commitment to continuous evaluation throughout the programme with evaluations after every module and a practical team assignment. Previously, the Spanish Ministry of Science and Innovation was providing funding that directly supported the course's implementation. For the new format, income from the micro-credential fees will offset part of the budget and will be used to ensure greater sustainability and reinforce its value proposition.

Local Contexts & Constraints

The first editions ran twice a week (typically for two consecutive days) every two weeks over the course of a semester. For this new edition, the programme is expected to be run two consecutive days on a weekly basis, for a shorter period of time. Like the previous editions, the programme is mostly in an in-person format. The content and the evaluations for the course are, and will keep on being, in English, and the participants and lecturers can present in the language that they (collectively) feel most comfortable with: Catalan, Spanish or English.

Historical feedback

All sessions are evaluated post-course, and participant feedback is overwhelmingly positive, praising networking opportunities (both peer-to-peer and with the experts) given the diversity of profiles and backgrounds involved. Their main critique is the fact that they usually wish for longer discussions and more practical examples, although the course claims to prefer lecturers who bring real-world experience (e.g., legal, finance) rather than purely theoretical presentations.

Sustainability & Adoption

Since day one, updating has been the hallmark stressed out by AGAUR for this course, evolving significantly between its first two editions: with the second edition being more practical. Now for the new edition, the programme undergoes an even deeper refresh, splitting into two shorter, highly focused courses (pre-award and post-award), with AGAUR being fully responsible for the coordination of the course, drawing on expert trainers from across Catalonia and the rest of Spain to enhance the strategy of the course.

The Institution's motivation and expectations

As Catalonia's main supporter of the R&D ecosystem, AGAUR aims to provide a training programme for RM professionals that universities and institutions can benefit from. The quality

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label is viewed as a tool to standardise and strengthen RM training and view micro credentials as a way to further enhance its recognition and impact.

3.2.5. Università degli Studi di Milano Bicocca: Meeting with Prof. Francesco Paoletti

Current Training Landscape

The course that is going to be used for pilot-testing is the ***Executive Masters in Management of Research Infrastructures (EMMRI)*** managed by Università degli Studi di Milano Bicocca (UNIMIB). Now preparing for its 6th edition, the first edition was piloted under the EU-funded Horizon 2020 RITrain project with between 35-40 participants selected from hundreds of applications worldwide. The first edition tuition was fully covered by the RITrain project (i.e., free for selected participants) and currently it is supported by the organisations/institutions where the participants work. This 2-year programme is targeted at senior Research Managers (those already in, or on track for, coordination or departmental leadership roles). With 20-25 participants selected per edition, the EMMRI programme focusses on core research-infrastructure (RI) management domains, including governance, financial planning, strategic development, and innovation, bringing together expertise from business administration, law, finance, human resources, and communications. The programme offers the possibility to, instead of taking the full programme, select only modules that participants find most useful and receive micro-credentials from these modules.

Local Contexts & Constraints

This programme consists of ten modules, two to four-day blocks each, in a blended format (on site and online, with some modules fully online). The evaluation for the programme is composed of formative assignments (distance-learning tasks) after each module, tackling real-life problems from participants' own RIs, and a Final Project, where each participant proposes a project directly relevant to his or her own work, and a faculty tutor is assigned based on the project scope. A final deliverable (written report) is produced, including an oral presentation before a jury (tutor included). As the programme welcomes participants worldwide all the content, lectures and assessments are delivered in English. The faculty is made mostly of members of UNIMIB, with key-relevant players (industry and infrastructures experts) invited as lecturers.

Historical feedback

Overall, participants provided very positive feedback. Due to the minimal lecturing and focus on hands-on activities (e.g., simulations, role-play), participants highlight the novel insights and practical skills they acquire. Weaknesses are occasionally reported: participants stated that modules are less directly aligned with their specific roles and thus, feel less relevant, or mention unmet expectations related to specific demands of their own work. Feedback also indicates a growing preference for fewer on-site sessions and a shift towards increased online delivery to accommodate participants travelling from abroad.

Sustainability & Adoption

The EMMRI management team reviews participant feedback after each edition (surveys, module interactions, and social events) and starts to co-design the following edition's

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programme (e.g., content, guest lecturers, formats). While the programme's key curriculum remains unchanged, minor changes are made (typically under 10% of the content) to each edition to ensure continual improvement. The programme does not involve national or regional government bodies, nor European agencies, in its governance or funding arrangements. Nevertheless, it regularly invites experts who have previously collaborated with European institutions to contribute as guest lecturers.

The Institution's motivation and Expectations

The motivation of UNIMIB's designated representative for joining the RM Framework and pilot-testing the handbook derives from their extensive previous experience in EU initiatives, like RITrain, aiming to contribute expert insights, fresh perspectives, and practical materials. Their success criteria include overwhelmingly positive feedback by participants to programmes that benefited from the handbook's usability, and ease of replication across institutions, the inclusion of a train-the trainers companion manual with case studies and ready-to-use examples, and the formal recognition via the quality label (alongside micro-credentials in specialised topics) that participants value. Finally, they emphasise the need for clear strategies to disseminate and promote the handbook's resources widely.

4. Onboarding & Handbook draft

The draft handbook brings together the chapters, tools, and supporting materials that WP1 has identified as most relevant, at this stage of the project, to be assessed by the pilot-testing partners. It is a working document, open to examination and refinement, and intended **to be enriched with practical examples** that reflect the experience of the participating organisations.

Serving as a mid-course checkpoint, the draft enables an initial assessment whether the handbook's content, structure and guidance are aligned with its proposed objectives and whether it is capable to meet the diverse needs, constraints and practices of institutions across Europe.

4.1. Pilot-testing workflow & timeline

The pilot-testing phase runs for **eight weeks** from early February, during which pilot-testers will work through the draft of the handbook using the guiding methodology set out in this document.

After the eight-weeks, follow-up meetings will be held with the pilot-testers to discuss their experience in more depth, clarify written feedback, and capture additional contextual insights. This two-step approach helps ensure that the evidence collected is comprehensive, context-sensitive and actionable, and supports WP1 and WP2 to consolidate, interpret and integrate pilot-testing input effectively into the next handbook version and the consolidation of the quality label. Figure 1. summarises the workflow: distribution of materials to pilot-testers, the interaction of pilot-testers with the handbook draft (pilot-testing phase), and the subsequent two consolidation steps with one-to-one meetings with pilot-testers in between, ultimately leading to input fed back to WP1 and WP2.

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Figure 1. Pilot-testing workflow and timeline, summary.

4.2. How to use the handbook in the pilot

Pilot-testers are provided with a draft of the handbook which they are invited to **explore** and annotate with **preliminary notes**.

Following this step, they are encouraged to proceed to follow Section 5 of this document in detail, answering questions, working on structured exercises and reflecting on the overall interaction with the chapters' content and proposed processes. These activities are structured around **core questions** (i.e., mandatory questions and exercises considered essential for WP1 and WP2) and complementary (**optional**) questions, intended to capture additional insights beyond the core requirements.

The methodology proposed requires pilot-testers to **engage with this draft of the handbook through a structured, reflective "learning diary" approach**, in which they **should document their interaction with the content, tools and guidance in a detailed and iterative manner**.

This interaction unfolds at two interconnected levels:

At a first level, pilot-testers should **assess whether the handbook is helpful, usable, intuitive, and whether its tools and guidance are sufficiently adaptable, context-aware and goal-oriented** to be realistically implemented in their own training environments.

At a second level, it is crucial for pilot-testers to **record their underlying reasoning processes while working with the handbook, explicitly comparing this experience with *how* their training programmes were originally designed before these tools and guidance were available**. Pilot-testers are encouraged to note:

- key decision points
- adaptations they introduce
- lessons learned.

Capturing these reflections is **essential for generating practice-based examples** (following the logic illustrated in the EURESTMA example, in the draft) that illustrate not only the outcomes but also, and more importantly, the **reasoning pathways leading to them**. These examples will help future users in navigating the handbook selectively and in adapting the proposed approaches and tools while retaining coherence, focus and purpose.

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5. Chapter-by-chapter guiding questions (instructions and reflections)

5.1. Introduction, Contextualisation & Coherent Frame for RM Qualification in Europe

Core questions:

Q1.1. Taken together, do the introductory/contextual chapters (including the definition of Research Management, RM proficiency levels, terminology, examples and related reference materials) provide a sufficiently complete and coherent foundation to frame RM training and qualification in a European Context?

Q1.2. From your perspective, is any essential contextual information missing? To what extent does the handbook's terminology align with existing European standards, frameworks and professionalisation approaches?

Q1.3. Taken together, do the introductory/contextual chapters provide a robust baseline to promote mutual recognition and interoperability of RM training across Europe?

Please indicate briefly what should be clarified or further explored to strengthen interoperability.

5.2. Good Practice Criteria & Formal Standards for Research Management Training

Pilot-testers should review these criteria against their own institutional practice, assess their relevance and feasibility, and contribute by providing concrete examples and reflections. **The aim is to validate the proposed criteria, identify gaps, and ensure they reflect diverse European training realities.**

Core questions

Q2.1. To what extent are the proposed good practice criteria (including the Bologna Process and related instruments) applied in your institution's existing RM training offer, and how feasible would their implementation be?

Q2.2. Are there any additional good practice criteria that should be included to better reflect RM training realities?

Optional questions:

QOp2.3. Do you consider these criteria suitable as a foundation for a future European quality label?

5.3. Programme (Training) Development process Guide

Pilot-testers should **use this chapter as a reference framework to critically reflect on their training programmes** (see section 3.)

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First, **retrace the original design logic of your existing training programmes and then revisit this process using the handbook's proposed three-phase cycle** (programme planning, development and management).

Document the interaction with the cycle and its steps, capturing whether the process logic is intuitive and how the guidance supports decision-making in practice.

Note and briefly explain any deviations, including skipped steps, adaptations or alternative approaches.

Pilot-testers should provide practical examples of how specific steps were used, alongside good practices drawn from their own institutional experience, to support a practice-based example approach that can inform and enrich the final version of the handbook

Core exercise 3.1.

1. **Revisit the programme using this chapter as a reference:** go through the Programme development guide step by step and compare each phase with how your programme was originally designed (e.g., Programme concept, Programme planning, Programme implementation/management).

2. **Document alignment and divergence:** reflect if these steps were considered when designing, implementing, managing, or assessing your programme; if they would have improved if applied; which were not applicable or were intentionally skipped, briefly explaining why (e.g., institutional constraints, resource limitations, regulatory context, alternative proven approach).

3. **Reflect on added value:** would the proposed guide lead to a similar outcome, would it lead to a more cohesive and sustainable programme, or did it not meaningfully change your current approach? Provide concrete examples.

4. **Learning-diary:** record short notes on clarity, usability, missing elements, redundancies, and suggestions for improvement (e.g., tools, decision points).

Optional questions:

QOp3.2. Does the guide adequately address sustainability aspects (e.g., funding models, resource planning, frequency of updates)? What should be added?

5.4. The RM Competence Framework as a practical tool & Curricular Components Method

This critical step should be approached as a **collaborative and reflective design exercise.**

Ideally, the same internal teams involved in the original development of the training programme — particularly trainers and other key institutional stakeholders — would participate at this point. Considering the time limitations of the pilot-testing phase and other possible constraints (e.g., staff availability), the involvement of at least one or two trainers is encouraged, keeping in mind that the **trainers involved should be related to the selected competences.** This helps recreate realistic decision-making conditions and to support critical stages of the development

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process, such as refining the target group, defining the scope of the programme, and particularly in advising instructional and curriculum design choices.

Using the proposed clustered tools and materials derived from the RM Roadmap project and The European Competence Framework for Research Managers (RM Comp), pilot-testers must **apply the proposed methodology to identify relevant competence areas and learning outcomes, and to reflect on how these translate into content, teaching methods and learning approaches.** An illustrative example (EURESTMA) is included to demonstrate the underlying logic of the process. However, **pilot-testers should document their own institutional reasoning throughout, including the steps followed and any adaptations introduced.**

It is crucial to reinforce that **this exercise is meant to be as flexible as possible**, and that pilot-testers are at liberty to adapt the competencies and learning outcomes of the RM Comp as necessary. It is imperative that pilot-testers meticulously document this process, as this will contribute to the refinement of the handbook. WP1 will use these reflections to understand how different institutions apply the tools in practice, and to strengthen the handbook with example-rich guidance that can inspire and support future users.

Core exercise 4.1:

1. **Describe the reference programme:** Provide a concise description of the reference programme, including its target audience and level, duration and format, main thematic focus and brief overview of current modules and topics. This will serve as a baseline against which subsequent outcomes and reflections can be compared.

2. **RM Areas selection:** In addition to the 'Competences relevant to all Research Managers', select **one or two primary RM Areas that best represent the programme**. **Select relevant core competences:** Select key competences associated to the selected area(s), while identifying also the intended proficiency level(s) (e.g., RM1–4).

   Pilot-testers should document **which competences align clearly** with the programme's scope, **and which ones feel too broad, narrow, missing**, and those that were **intentionally excluded** and why. Validate these choices with the original programme team and/or other relevant stakeholders involved in the programme.

3. **Learning outcomes selection and validation:** At this stage, the involvement of at least one trainer and one institutional stakeholder with expertise in the relevant competence areas is strongly recommended. Their role is to review the selected competences, provide feedback and support the initial identification and refinement of learning outcomes.

   Learning outcomes may be selected from RM Comp[4] (available for download here), or, like the competences, pilot-testers can suggest additional ones, that they feel fit better with the programme's scope.), or, like the competences, pilot-testers can suggest additional ones, that they feel fit better with the programme's scope.

[4] RM Comp: The European Competence Framework for Research Managers. https://research-and-innovation.ec.europa.eu/document/download/b2723267-0a7a-4459-88a3-8639b25fceb5_en?filename=ec_rtd_research-competence-managers-presentation.pdf

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4. **Review teaching and learning approaches:** With continued involvement of the internal teams and key stakeholders involved and one institutional stakeholder, related to the selected competences, the following step is to review the mapped curriculum and delivery approach. Pilot-testers should d**ocument the feedback received, changes made after discussion and points of agreement or areas of resistance**. Additionally, they should reflect on whether this process improved coherence or transparency, added complexity, and/or revealed constraints not addressed in the handbook.
5. **Learning diary:** Throughout the exercise, pilot-testers should record where the tools and guidance are clear or ambiguous, highlighting moments where they are particularly helpful or constraining. It is also important to point out which **steps were skipped or adapted,** and why. Ultimately, in **what way this method added value, examples drawn from the pilot-tester's own experience and concrete changes recommended to improve the chapter**.

6. Quality Label

WP2 led by EARMA and aiming to establish a quality label, has also taken this opportunity to understand, from the pilot-testers' perspective, the added value of this proposed voluntary, developmental, and proportionate reference model to support Research Management training across the ERA. These questions aim to determine which elements of this model are feasible and appropriate for any long-term implementation.

Key questions for pilot-testers

A. Clarity and usability

Q5.1. Were the instructions, terminology, and checklist items clear and understandable?

Q5.2. Which elements felt most useful, and which were unclear, redundant, or burdensome?

Q5.3. Was it straightforward to link the quality label to RM COMP and the RM Framework Handbook?

B. Proportionality and feasibility

Q5.4. Did the evidence requested feel proportionate to the scale and nature of your programme?

Q5.5. Did smaller or modular formats encounter any difficulties in completing the self-assessment?

Q5.6. Which aspects might benefit from simplification?

C. Internal coherence and alignment

Q5.7. Did the procedure help you reflect on the alignment among learning outcomes, methods, and assessment?

Q5.8. Where did the framework support coherence, and where did gaps appear?

D. Feedback and perceived usefulness

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Q5.9. What types of feedback would be most useful?

Q5.10. Did the process stimulate internal discussion or reflection?

E. Sustainability and long-term implementation

Q5.11. What would you consider necessary to make the model sustainable and easy to implement independently after the project ends?

F. Relevance and contextual fit

Q5.12. Does the label reflect the realities of RM training in your institutional/national context?

Q5.13. Are there any contextual constraints or differences that should be better addressed?

Q5.14. To what extent does the approach align with, complement, or differ from your existing quality assurance processes (if applicable)?

7. Post-questionnaire & learning diary overview

Core questions (please feel free to refer to answers to previous questions if useful to avoid repetition)

Q6.1. From the current draft, what added value does the handbook (including its tools and guidance proposed) provide to your practice? Does the handbook offer enough flexibility to accommodate institutional diversity within the ERA?

Q6.2. When applied in practice, how **flexible, intuitive and coherent** did the handbook's tools, cycles and guidance feel?

Please reflect on whether **the flow of the document supported realistic use** across different contexts, and whether the level of detail and structure felt sufficient.

Q6.3. About the structure: do the chapters build logically on one another, without redundancy or gaps?

Q6.4. Does the handbook provide sufficient structure and orientation to support concrete decision-making? At which stage(s) of your institution's development or training cycle does the handbook seem most useful (planning, implementation, evaluation, redesign)?

Q6.5. Does the handbook work best as a **single integrated document**, or would usability improve through alternative formats (e.g., modular documents, web-based navigation with layered access to tools and examples)? Which delivery formats (digital, hybrid, print) would be most practical for your institution?

Q6.6. From your overall experience, what are the **most important considerations learned from this pilot-test**, and what should WP1 prioritise for improvement in the next version of the handbook? What mechanisms would help maintain the handbook as a "living document" within your institution?

Q6.7. Is the handbook **adequately referenced** (quality of documents and sources) to support verification and follow-up? What references are missing or should be added?

Q6.8. Where do you see a need for additional supporting materials or guidance?

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Q6.9. Are the examples provided realistic and transferable to your institutional context? Do the examples represent a sufficiently broad range of scenarios across the research-management or research-infrastructure landscape?

8. One-to-one post-assessment meetings

After the pilot-testing phase, individual post-assessment meetings with each pilot-tester will be held. These meetings complement the written responses by allowing a more contextualised discussion of the overall experience, clarification of feedback, and explore transversal observations and strategic priorities.

9. Data collection and compilation feedback report

Feedback from the core/optional questions and reflective exercises will be combined with insights from the one-to-one meetings. WP1 and WP2 will receive a consolidated report organised by different groups of questions, preserving relevant context and providing practice-based examples to support validation and refinement of the RM Framework Handbook and consolidation of the RM Framework Quality Label.

10. Conclusion

As a core output of the RM Framework project, Pilot-testing is designed as a learning, evaluation and co-creation process. Participating institutions through structured application of the handbook draft, reflective exercises, targeted questions and follow-up discussions, will enrich with practice-based examples to refine and validate the RM Framework Handbook and to advance the feasibility and usefulness of a future European Quality Label for RM Training. Ultimately, this process, the resulting materials and tools will support the recognition, sustainability and continued professionalisation of the RM field across the ERA.

Next steps, will focus on continued peer engagement and target feedback to shape the final handbook and consolidate a quality label for RM training, ensuring both outputs remain practical, adaptable and relevant across diverse institutional contexts.

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11. References

11.1. Reports, Policy, and Online Sources

RM Roadmap Final Report D1.2.
https://static1.squarespace.com/static/633ae0b47dc8ac471e5978a9/t/6878ba2e8464c26f256d9 743/1752742449508/RM+Roadmap_D1.2_HETFA_Report+on+ERA-wide+landscape.pdf

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12. Annexes

ICT Tools and GDPR Compliance Table

Tool usd	Information on GDPR Compliance	How the tool is used in RM Framework
MS Teams	https://www.microsoft.com/en-gb/privacy/privacystatement	RM Framework consortium uses Teams for its meetings with partners.
SharePoint	https://learn.microsoft.com/en-us/answers/questions/1012781/sharepoint-privacy-settings	RM Framework will use this service to assist to store research material to be shared with other partners.

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