

RM¹ FRAMEWORK

D5.1 Project Management Handbook

EARMA



Disclaimer: This deliverable has not yet been reviewed by the European Commission. Its content might therefore change as a result of the review process.



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Project full title

**“Creating a European Framework for Research Management Training
and Networking”**

Project acronym

RM Framework

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D5.1 Project Management Handbook

www.rm-framework.eu

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PU – Public (fully open, automatically posted online on the Project Result platforms);

SE – Sensitive (limited under the conditions of the Grant Agreement);

CO – EU classified: EU restricted, EU confidential, EU secret under Decision 2015/444.



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List of abbreviations

ALLEA	All European Academies
CDE	Communication, Dissemination, Exploitation
EC	European Commission
EEAB	External Expert Advisory Board
ERA	European Research Area
GA	Grant Agreement
HEI	Higher Education Institution
KER	Key Exploitable Result
KPI	Key Performance Indicators
NDA	Non Disclosure Agreement
PDEC	Plan for Dissemination and Exploitation including Communication activities
REA	Research Executive Agency
RFO	Research Funding Organisation
RM	Research Management
RMs	Research Managers
RPO	Research Performing Organisation
RSO	Research Support Office
RTD	Research and Technological Development
RTO	Research and Technology Organisations
WP	Work Package



Executive Summary

The RM Framework Project Management Handbook serves as a structured guide for managing the project, outlining goals, coordination mechanisms, challenges, and resource allocations. The Handbook ensures efficient project execution while supporting the development of a standardised yet adaptable research management framework in Europe.

1. Introduction

This section provides a brief introduction to the report, including the reporting period, the team responsible for management and coordination, and the scope of activities covered.

Team responsible for management and coordination:

- **The Coordinator (EARMA)** – is responsible for the financial, administrative, and operative coordination between the Work Packages, contingency planning and crisis management, as well as for the facilitation of internal communication within the project. They are also acting at the interface on all matters between the consortium and the European Commission as well as relevant stakeholders. Specifically, the Coordinator is responsible for the day-to-day supervision and monitoring of project activities in line with the pre-defined timetable, ensuring fulfilment of all contractual requirements, coordination of activities between partners, organisation of project meetings, ensuring high quality of produced outputs, technical and financial reporting, including regular monitoring of project costs, follow up on EC payments, assistance to beneficiaries on specific administrative and financial issues, and carrying out periodic financial monitoring. Furthermore, the coordinator tracks dependencies between Work Packages and facilitates integration across teams in coordination with Work Package Leaders and the General Assembly and provides guidance on internal workflows and decision-making processes in coordination with the Work Package Leaders. The coordinator maintains a clear vision of project goals and ensures alignment with approved methodology and deliverables.

The EARMA coordination team includes:

- Nik Claesen, Managing Director
- Teodora Konach, Head of Professional Development
- Janina Bau, EU Projects Officer and Research Analyst
- Lorenzo Molina, EU Projects Officer and Research Analyst

Scope of activities covered (until M3):

- Kick-off meeting on the 10th-11th of February 2025
- Communication and knowledge management channels and tools
- Signed NDAs from the External Expert Advisory Board
- Work Package Leaders Meetings



2. Collaboration and Communication: project goals and objectives

This section outlines the goals and objectives by the consortium in the project.

The RM Framework project aims to support the development of an European qualification system for research management (RM), enhancing interoperability and improving RM within the European Research Area (ERA). The framework is designed to guide policy, training, and networking providers in empowering individual research managers through standardised professional development programmes. By offering a common framework yet maintaining a flexible approach, the project acknowledges the local and national differences across Europe and aims to develop training that raises awareness, improves quality, and supports sustainable RM careers.

This initiative involves stakeholders from ten countries (Belgium, Czechia, France, Germany, Hungary, Italy, Poland, Portugal, Romania and Spain), supported by an extensive network of European and national RM organisations. The project emphasises collaboration with the leadership of research performance organisations (RPOs) to create a suitable transition model, ensuring innovative and practical solutions are identified and implemented that reflect current ways of working. A core element of the development of the Framework is the use of design thinking, a creative and human-centred problem-solving approach, to tailor RM training and accreditation processes. This methodology ensures that the Framework is both practical and grounded in the real-world needs of RM professionals.

By engaging key stakeholders to develop modular, tailored solutions, including the creation of a quality label, the project aims to foster sustainable, long-term improvements in RM professional development programmes across Europe.

Table 1: Collaboration and Communication: Goals, objectives and key performance indicators (KPIs)

Project management platform operational.	<ul style="list-style-type: none"> • SharePoint created by February 2025. All documents will be uploaded on SharePoint, accessible to everyone.
External Experts Advisory Board (EEAB) members pro-actively involved.	<ul style="list-style-type: none"> • The EEAB consists of 8 experts. • EEAB members were invited to: <ol style="list-style-type: none"> 1. The kick-off meeting on the 10th and 11th of February 2025 in-person at the EARMA office in Brussels. 2. EEAB members will be invited to joint specific horizontal Taskforces, taking into account their specialisms.
WP and Task leaders activated through dedicated regular meetings.	<ul style="list-style-type: none"> • One in-person General Assembly in October 2025 in Budapest. • Monthly WP Leaders meetings (Executive Board established with WP leaders), with the first initial meeting with WP Leaders in March 2025. • WP leaders are responsible for closely coordinating with task leaders of their work package and to ensure a two-way communication

Project partners disseminated the project in dedicated external events.	<ul style="list-style-type: none"> The project will be presented at the INORMS Conference in Madrid beginning of May 2025. An internal dissemination monitoring tracker will be established and shared with the consortium, in coordination with WP4.
Initial and preliminary communication about the project	<ul style="list-style-type: none"> Given the short duration of the project, the coordinator initiated communication and active exchange among partners prior to the official kick-off and took the lead in organising preliminary meetings, including an online plenary meeting on the 18th of November 2024 and an in-person meeting for WP leaders on the 9th of December 2024. The project was featured in the Research Professional News in January 2025. The project has been announced via the EARMA Newsletter in December 2024. The project was announced via LinkedIn by EARMA and project partners, with EARMA providing a LinkedIn template. The Kick-off meeting was disseminated through the EARMA LinkedIn Account.

3. Challenges encountered

This section presents the critical risks identified for the project, together with the corresponding mitigation measures proposed in the Grant Agreement. These risks will be closely monitored throughout the project's lifecycle to ensure timely responses and to support the achievement of the project's objectives.

Table 2: Critical risks for implementation identified in the project proposal and GA

Description of risk (indicate level of (i) likelihood, and (ii) severity: Low/Medium/High)	WP(s) involved	Proposed risk-mitigation measures
One or more partners exits the project prior to completion. Likelihood: Low Severity: High	WP4, WP2, WP3, WP5, WP1	Regular communication to ensure the integrity of project responsibilities but also requirements of the concerned organisation. There is overlap in skills among partners and work could be redistributed to ensure completion of the project.
Partners unable to complete key deliverables within the specified time. Likelihood: Low Severity: Medium	WP4, WP2, WP3, WP5, WP1	In addition to regular virtual project meetings, a joint calendar will be published listing all key deliverables. There will be continuous monitoring of the progress in each WP and notification of important deadlines. In the case of extreme delays, workload and resources can be reallocated to ensure timely delivery of all

		work.
Inadequate collaboration between partners. Likelihood: Low Severity: Medium	WP4, WP3, WP2, WP5, WP1	Regular meetings (virtual and face-to-face) consisting of one a month check-ins and consortium meetings will further communication and mitigate collaboration problems.
A change in senior leadership (university and/or municipality) which leads to a lack of engagement in, or support for, RM Framework activities. Likelihood: High Severity: Medium	WP4, WP2, WP3, WP5, WP1	Every effort will be made to convey the benefits of the RM Framework project and to address any objections or difficulties. If a partner is rendered unable to produce the required deliverables the coordinator will consider the cost/ benefits of them remaining in the consortium.
Engagement Risk: Likelihood: Low Severity: Medium	WP4, WP2, WP3, WP5, WP1	Key allies at all levels of partner organisations will be recruited to the project early on. The participatory nature of the design thinking methodology will help overcome some resistance with its bottom-up approach.
The risks of not engaging key stakeholders sufficiently in co-creation in combination with the strong dependency of some WPs on one partner and to the short project duration. Likelihood: Low Severity: Medium	WP4, WP2, WP3, WP5, WP1	<p>The risk of not engaging key stakeholders is considered low due to the strong composition of the consortium, the high visibility of the RM Roadmap project aligned with ERA Action 17, and the support of established networks, including the RM Roadmap Ambassador Network. While some Work Packages rely on individual partners, this is balanced by internal expertise and clear ownership structures that ensure accountability and flexibility.</p> <p>WP3 and WP4 carry the highest risk due to their reliance on specific partners. WP3 is more critical, as it involves broad stakeholder engagement and pilot testing. However, EARMA, HETFA, and 4EU+ have the capacity to provide backup if needed. In WP4, HETFA leads with additional expert support available, and EARMA's communications team or external partners can be activated in case of unforeseen issues. These measures ensure the project remains resilient and responsive.</p>

4. Research Integrity

4.1 Basic principles

RM Framework builds on the principles of Reliability, Honesty, Respect and Accountability, as described in [“The European Code of Conduct for Research Integrity” revised edition](#) published by ALLEA in 2023. This Code articulates the values and norms of responsible research necessary to maximise the quality and robustness of research outputs, and to counter threats to, and violations of, research integrity.

RM Framework will:

Ensure *reliability* through a comprehensive and well thought through research and development processes involving appropriate data, methods and analyses.

Ensure *honesty* by the way data is handled – and in the open and transparent way in which the research and development process is carried out and reported.

Make *respect* key in the research and development process – internally towards fellow researchers and collaborators as well as externally in relation to respondents, collaborators, the research and the RM community and society in general. RM Framework expects every member of the consortium to treat internal and external stakeholders with respect and dignity and apply high ethical standards to secure the protection of human participants as well as personal data.

Ensure *accountability* through the management plan for RM Framework and organisation of it – and through a comprehensive quality assurance process (described in section 7).

4.2 Ensuring Good Research Practices

In RM Framework, the individual partner institutions must make sure that they live up to these guidelines. RM Framework will create an environment of mutual respect and promote values such as equity, diversity, and inclusion. It is especially important that junior staff are supported by their institutions and guided by senior members of staff, when carrying out tasks within the RM Framework project.

Work Package leaders have, in collaboration with the Expert Executive Advisory Board, the responsibility for ensuring that appropriate and good ‘research procedures’ are used throughout the project. WP leaders will make it clear who is responsible at various levels in the WP. All participants are individually responsible for implementing good research practices in their work. In addition, Work Package Leaders are required to ensure that all research and development activities comply with applicable ethical standards and regulations within their respective areas.

5. The Consortium of RM Framework

The consortium consists of seventeen partners from ten different EU countries. All partners have been carefully selected on the basis of their competencies, methodological skills, and expertise together with their experiences and knowledge from related national and EU projects as well as relevant networks and communities. The consortium is listed in Table 3 and the relevant expertise, skills and knowledge of the partners are described in detail in the Grant Agreement.

Table 3: The composition of the consortium:

Partner no.	Short Name	Organisation Name	Role	Country
1	EARMA	EUROPEAN ASSOCIATION OF RESEARCH MANAGERS AND ADMINISTRATORS	Coordinator	BE
2	CHE	GEMEINNUTZIGES CENTRUM FÜR HOCHSCHULENWTICKLUNG	WP Leader	DE
3	HETFA	HETFA KUTATOINTEZET KFT	WP Leader	HU
4	UC	Universidade De Coimbra	WP Leader	
5	AGAUR	AGENCIA DE GESTIO D'AJUTS UNIVERSITARIS I DE RECERCA	Task Leader	ES
6	DREU	GENERALITAT DE CATALUNYA DEPARTAMENT DE RECERCA I UNIVERSITATS	Affiliated Entity	ES
7	4EU+	4EU+ EUROPEAN UNIVERSITY ALLIANCE E.V	Task Leader	DE
8	UNIWARSAW	UNIWERSYTET WARSZAWSKI	Affiliated Entity	PL
9	CU	UNIVERZITA KARLOVA	Affiliated Entity	CZ
10	SU	SORBONNE UNIVERSITE	Affiliated Entity	FR
11	UNIMIB	UNIVERSITA' DEGLI STUDI DI MILANO-BICOCCA	Task Leader	IT
12	ZWM	ZENTRUM FÜR WISSENSCHAFTSMANAGEMENT E.V.	WP Co-Leader	DE
13	MCAA	MARIE CURIE ALUMNI ASSOCIATION	Associated Partner	BE
14	CORVINUS	BUDAPESTI CORVINUS EGYETEM	Associated Partner	HU
15	UPM	UNIVERSIDAD POLITECNICA DE MADRID	Associated Partner	ES
16	UMFCD	UNIVERSITATEA DE MEDICINA SI FARMACIE CAROL DAVILA DIN BUCURESTI	Associated Partner	RO
17	CZARMA	Ceska asociace manazeru a administratoru ve vyzkumu, z. s.	Associated Partner	CZ

6. Resource Management

This section examines the effective management of resources by the coordination team, with particular attention to how these resources support the achievement of the project's objectives. It provides an overview of the resources allocated, including a review of deliverables, milestones, and associated activities. While financial aspects such as the meeting budget are considered, the emphasis is on assessing overall efficiency and alignment with planned outcomes.

The coordinator, in close cooperation with the partner responsible for meeting organisation and the respective Work Package leaders, will establish regular monitoring mechanisms to track the use of dedicated resources and ensure the timely organisation of foreseen events by all partners. To avoid underspending and maximise budget utilisation, interim controls on financial progress will be implemented at regular intervals throughout the project. In case a specific need arises, internal controlling mechanisms can be introduced by the coordinator upon proposal by the partners, to further strengthen financial oversight and budget execution.

- *Budget for advisory board and associate partners:* HETFA partner is in charge of the advisory board travel arrangements and associated. To minimise costs, many meetings can be joined online and could be recorded. All recordings will be in line with the GDPR and the data management plan of the project. In addition to this, the project kick-off meeting was streamed online to facilitate broader participation.
- *Budget for Pilot Testing Institutions:* HETFA partner is in charge of the reimbursement of pilot testing meetings, including the organisation of a pilot testing meeting in Budapest/Hungary.

Following a brief overview of the financial aspects, including the allocation of resources for key activities such as meetings, the focus shifts to the progress on planned deliverables and milestones. This approach ensures a comprehensive view of both the support mechanisms in place and the concrete outcomes they are intended to facilitate. By examining these elements together, it becomes possible to assess not only the efficiency of resource use but also the alignment of project activities with strategic objectives.

The following deliverables will be achieved by the project (Table 4):

D4.1 Plan for Dissemination and Exploitation including Communications activities	HETFA	April 2025
D5.1 Project Management Handbook	EARMA	April 2025
D5.2 Data Management Plan	EARMA	July 2025
D1.1 Preliminary RM Framework Report	CHE	October 2025
D2.1 Quality label method, owner and testing approach	EARMA	January 2026

D3.1 Detailed pilot testing approach	UC	January 2026
D2.2 Quality Label	EARMA	January 2027
D3.2 Pilot testing outcomes	UC	January 2027
D4.2 Dissemination, Exploitation and Communication report	HETFA	January 2027
D 4.3 Case Studies, Value Proposition, Impact assessment	EARMA	January 2027
D 4.4 Policy Recommendations	HETFA	January 2027
D 4.5 Business Model and Sustainability Report	HETFA	January 2027

The following Milestones will be achieved by the project (Table 5):

M1 Project Website	HETFA	April 2025
M2 RM Framework brand identity&visual design	HETFA	April 2025
M3 Stakeholder list	UC	June 2025
M4 RM Framework Dissemination Material, including Newsletters and Brochure, Posters, Videos	HETFA	July 2025
M5 Good Practice RM training manual-Guideline for the adaptation, complementation and specification of good practice RM training	CHE	December 2026
M6 Mentoring and train the trainer qualification for RM training providers manual-Guideline for the provision of mentoring and train the trainer qualification for RM training providers	ZWM	December 2026
M7 Pilot Testing complete	UC	November 2026



M8 Case Studies, Value Proposition, Impact assessment	HETFA	November 2026
M9 Policy Recommendation	HETFA	January 2027

7. Quality Assurance

The final quality control of deliverables will take place via a peer review process. No deliverable in RM Framework will be submitted to the European Commission without having undergone a thorough review process where a suitable external or internal reviewer has commented on it, made suggestions for improvements, and where the author(s) in dialogue with the WP leader have adjusted the deliverable according to the review and recommendations. The process is illustrated in Figure 1:

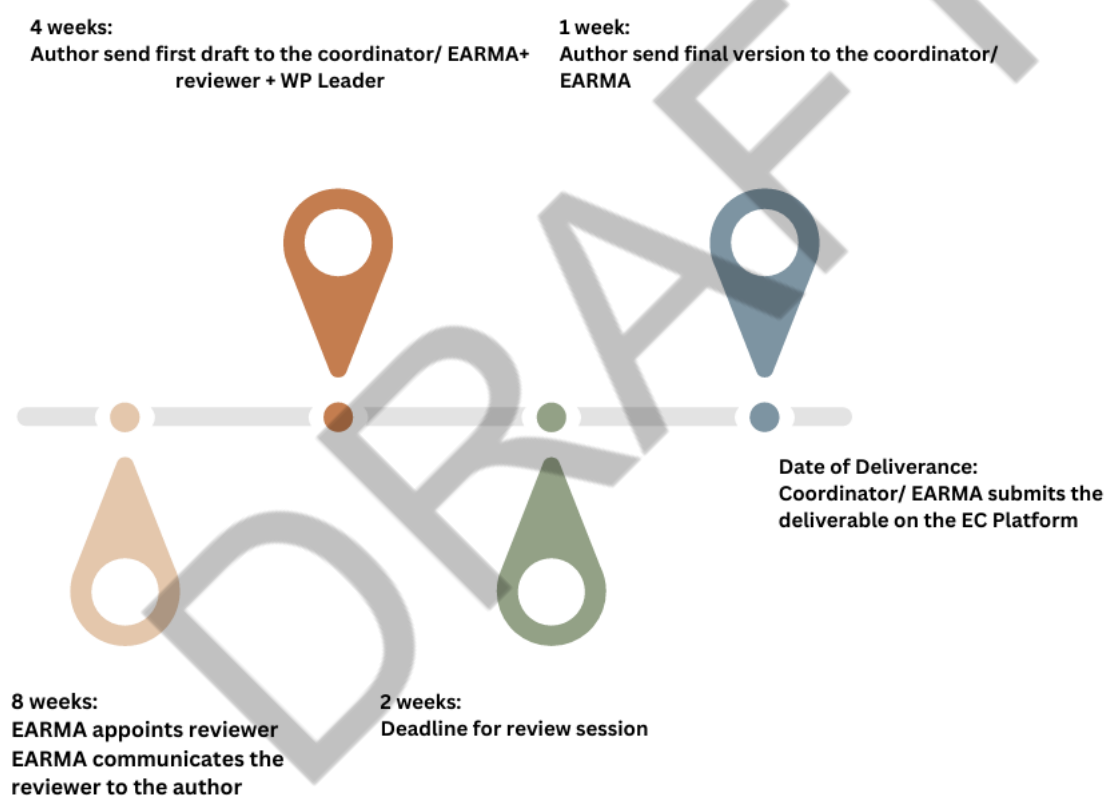


Figure 1: Timeline for Quality Assurance

This means that the author must finish a first version of the deliverable latest four weeks ahead of the date of deliverance. To secure a smooth review process, it is the responsibility of the coordinator to make sure that a qualified reviewer is appointed at least eight weeks ahead of deliverance and to inform the authors about the name and contact details. The review process will be open and the names of the reviewers will be listed on the deliverables. The reviewers will typically be other members of the consortium including associated partners or members

of the External Expert Advisory Board, but also other experts can be used as reviewers if the coordinator finds this necessary.

It is the coordinators responsibility to upload the deliverable on time. As for implementing potential revisions suggested by the reviewer, the coordinator will act as the editor and will have the final say, in collaboration with the author of the deliverable and with the acceptance of the WP leader.

8. Conclusion

This section concludes the report by summarising the key points discussed throughout. It reiterates the achievements, challenges, and recommendations, emphasising the importance of effective management and coordination for organisational success.

- RM Framework will apply the highest standards of good research practices as outlined in the [ALLEA Code](#).
- The Knowledge and Communication platform (SharePoint) has been set up to ensure the flow of communication across different work packages and to provide timely execution of tasks.
- Regular meetings including Work Package leaders have been scheduled for the first six months of the project. Main structures are in place including the External Expert Advisory Board and the Executive Team consisting of Work Package Leaders.
- A schedule for deliverables has been set up to guarantee the finalisation of deliverables on time, including a Quality Assurance Plan to ensure the timely submission of deliverables.
- The RM Framework kick-off meeting took place in February in Brussels with Work Package Leaders and partners, associated partners, affiliated partners, as well as the External Expert Advisory Board joining in-person and online.

This Handbook will be treated as a living document, subject to revision and updates at least every six months, or whenever major changes or updates to the planned work occur. This approach will ensure that the document remains accurate, relevant, and aligned with the project's ongoing developments.



9. Annexes

ANNEX 1 RM FRAMEWORK External Expert Advisory Board

RM FRAMEWORK External Expert Advisory Board

Terms of Reference

Version April 2025

1. Purpose

1.1 The purpose of the RM Framework External Expert Advisory Board [EEAB] is to provide independent, effective, and evolving support to the RM Framework project over its life cycle. RM Frameworks EEAB further advances the project's trans-disciplinary approach bringing together the expertise and knowledge.

2. EEAB Members – Nomination and Term

Alasdair Cameron, Chief Executive Officer at ARMA UK; Avi Staiman, CEO Academic Language Experts and SciWriter.AI co-founder (AI and funding specialist); Evan Roberts, Executive Director at the Society of Research Administrators International; José Santos, Researcher & RTD Manager Researcher & RTD Manager Polytechnic Institute of Bragança & expert in research in research management; Laura McDonald, Chief Executive of ASTP (pan-European association for professionals involved in knowledge transfer among universities and industry); Ludovic Thilly, Full Professor at the University of Poitiers, Executive Vice-Rector in charge of European Networks and member of the Executive Board of the COIMBRA Group; Maéva Vignes, Data Scientist Consultant & Funding Advisor at University of Southern Denmark (AI and RM specialist); and Simon Porter, VP of Research Future at Digital Science (AI specialist)



External Expert Advisory Board Members

Alasdair Cameron	<ul style="list-style-type: none"> • Chief Executive Officer at ARMA UK • Judge at the Times Higher Education • Holds a PhD in Semiconductor Optoelectronics • RM Roadmap Ambassador of the U.K
Avi Staiman	<ul style="list-style-type: none"> • Founder and CEO of Academic Language Experts since 2013 • Co-Founder of SciWrtier.AI • Core Team member of CANGARU since 2023 • Member of the AI for developing countries forum since March 2025 • Member of Entrepreneurs' Organization since 2022 • Honoured with the 2005 state of Maryland Youth Entrepreneurs Award in 2005
Evan Roberts	<ul style="list-style-type: none"> • Executive Director at the Society of Research Administrators International since 2018
José Santos	<ul style="list-style-type: none"> • Researcher & RTD Manager at Polytechnic University of Bragança since 2012 • Involved in the RAPIDS: Research Administration Professional Identity Values Scale project at the Polytechnic University of Bragança • Editor of the Journal of Research Management and Administration since 2023 • Co-founder of the Project Management Thematic Group at EARMA • Holds a PhD in Chemical Engineering, Polymer Engineering
Laura MacDonald	<ul style="list-style-type: none"> • Chief Executive at ASTP since 2016 • Consortium member of RM Roadmap: Leader of WP6 in the RM Roadmap Project
Ludovic Thilly	<ul style="list-style-type: none"> • Full Professor at the University of Poitiers • Executive Vice-Rector in charge of European Networks and member of the Executive Board of the COIMBRA Group
Maéva Vignes	<ul style="list-style-type: none"> • Freelance in Data Science & EU Research Funding since 2024 • Awarded with the Marie Curie Individual Fellowship by the European Commission • Holds a PhD in Philosophy, Biophysics and Microfluids
Simon Porter	<ul style="list-style-type: none"> • VP Research Futures at Digital Science since 2023