RM
ROADMAP

D5.3 First Management and Coordination report

The purpose of this management and coordination report is to provide an overview of the activities, achievements, and challenges faced by the management and coordination team during the reporting period September 2022 – August 2023.

WP5, Project Management, EARMA

Project full
title

"Creating Framework Conditions for Research Management to Strengthen the European Research Area"

Project

acronym

RM

Roadmap

Grant Agreement no.

101058475

D5.3 First Management and Coordination report

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Dissemination level[1]:	PU
Submission date:	31 August 2023
Start date of project:	September 1st, 2022
Duration of the project:	36 months
Organisation name of lead contractor for this deliverable:	EARMA

Document metadata

Version	Date	Modification reason	Modified by
1.0	14-07-2023	First draft	Borana Taraj, Aslak Skarvøy
2.0	23-08-2023	Second draft	Borana Taraj, Michael Papadopoulos,
3.0	30-08-2023	Third draft	Borana Taraj, Teodora Konach, Nik Claesen, Andri Charalambous

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1. Executive summary

The purpose of this management and coordination report is to provide an overview of the activities, achievements, and challenges faced by the management and coordination team during the reporting period. The report highlights key milestones, outlines the progress made towards organisational goals, and discusses any issues that require attention and resolution. The report also includes recommendations for improvement and future actions.

2. 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.

Reporting period: 1st September 2022 to 31st August 2023

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. 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.

The EARMA coordination team includes:
- Nik Claesen, Managing Director
- Borana Taraj, Head of EU projects
- Olaf Svenningsen, Senior RM Liaison/Senior Project Advisor
- Evelina Brännvall, EARMA Chairwoman
- Nyle Lennon, Head of Communications

Scope of activities covered:

RM Roadmap will chart a course for the future of research management (RM) in Europe and a community to support its delivery. It will be conducted over 36 months and is funded to the amount of €1.5m by the European Commission Horizon Europe funding programme under Grant Agreement N. 101058475.

The overarching objective of RM Roadmap is to identify and adapt the research management capital base of the EU, including the widening countries, and emerging needs of its current and future research management workforce to improve the EU's competitiveness and sustain its economic performance.

RM Roadmap will allow existing European networks to connect on a smart community platform which will enable an unprecedented consultation process in research management. This co-creation process will gather the existing communities and expand upon them to reach two main objectives: to create and inform a bottom-up consensus on the future of RM in a roadmap, and to inform the community about existing training, networking, funding, and career mobility opportunities.

Eight partners are working together on this project: European Association of Research Managers and Administrators (Belgium); HETFA Research Institute (Hungary); Nova University Lisbon (Portugal); Association of European Science & Technology Transfer Professionals (Netherlands); Crowdhelix Limited (Ireland), The Cyprus Institute (Cyprus) and associated partners Janssen Pharmaceuticals (J&J) and Una Europa (Belgium).

3. Collaboration and Communication: Project goals and objectives

This section outlines the goals and objectives reached by the consortium during the reporting period. It includes a summary of the key performance indicators (KPIs) or metrics used to measure progress towards these goals. In addition, this section highlights the coordination efforts and communication strategies implemented by the management team. It discusses the methods used to foster collaboration among team members, departments, and external stakeholders.

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

Project website, social media channels and visual identity established.	- Project website established in M2 of the project (October 2022) with two months ahead of schedule. By August 2023, the website had 16000 unique visits with an average time of just under 3 minutes. - RM Roadmap Twitter account: by August 2023, the account has 287 followers and 124 tweets posted. - RM ROADMAP LinkedIn account has 560 followers. - Visual identity: During the first 12 months of the project, RM ROADMAP finalised the main elements of the project's visual identity and launched main communications platforms: the project website, social media channels, and, the RM Helix.
Project management platform operational.	RM Roadmap has a EMDESK licence of 15 users and unlimited guests. Users can manage (create new records, update, move and delete records), edit (update records) and read (read records). Guests can read records. Each partner has at least one or two user rights and unlimited guest rights. The owner of the platform is the coordinator, EARMA.
All deliverables and milestones achieved.	By month 12, 4 milestones are achieved and a total of 12 deliverables (4 in February and 8 in August 2023) – see section 4: Achievements.
Advisory Board (AB) members pro-actively involved.	AB members were invited to: (1) All project General Assembly (GA) meetings

	(two physical on 8 September 2022 and 8 May 2023 and one online on 25 January 2023; next online GA meeting is planned on 20 September 2023);
	(2) 1st Ambassador meeting in Budapest, back-to-back with European Research Area Action 17 workshop, 8-9 May 2023, Budapest, Hungary
	(3) Review project deliverables according to their experiences and expertise outlined in a dedicated Terms of reference for Advisory Board members. A dedicated AB meeting was organised on 20 June 2023.
WP and Task leaders activated through dedicated regular meetings.	● Five meeting have been organised since the start of the project on a regular basis, every two months (09.11.2022, 07.12.2022, 23.01.2023, 08.03.2023, 07.06.2023). Agendas and meeting minutes are collected in the EMDESK common project management tool.
Collaboration with sister project from the same call (HORIZON-WIDERA-2021-ERA-01) CARDEA ongoing on a regular basis.	● One physical meeting organised in November (25.11.2022) in Leuven, Belgium between project coordinators: EARMA and University College Cork (UCC). ● 5 physical or online meetings organised (21.09.2022, 24.10.2022, 14.02.2023, 11.04.2023, 6.06.2023) between coordinators EARMA, UCC as well as main WP leaders in common identified activities (HETFA, NOVA, University of Macerata, CERCA). ● Memorandum of Understanding under finalisation, expected to be signed in autumn 2023.
Project partners disseminated the project in dedicated external events.	● The project partners effectively disseminated the project's scope and outcomes in 25 distinct external events.[1]
Communication about the project through newsletters, articles etc.	● The project's progress and achievements were communicated via 15 targeted outputs, including newsletters and articles.[2]

[1] Information included on: (1) the EC portal, Continuous reporting: Dissemination activities by August 2023. The information will be updated on a regular basis; (2) D4.4: Preliminary Dissemination, Communication and Exploitation Report.

[2] Information included on: (1) the EC portal, Continuous reporting: Communication activities by August 2023. The information will be updated on a regular basis; (2) D4.4: Preliminary Dissemination, Communication

Consortium agreement signed.	● Consortium agreement was signed in August 2022. It was updated in May 2023 with the addition of two new advisory board members.
Ambassador Network established.	● Recruitment of (National) Ambassadors has been completed by 31 May 2023 (milestone 3). 115 ambassadors and associate ambassadors from 40 European countries have been recruited. 60 participated in the first ambassador meeting in Budapest, 9 May 2023 (more information on the RM Roadmap website here and EARMA website here).[3] ● The project consortium has successfully focused its attention on the recruitment of national ambassadors to be completed by the end of May 2023. The recruitment of the Communities of Practice Moderators will be completed by January 2024. The reason is that the subcategories of communities of practice need to be defined in WP1 also in close collaboration with the CARDEA Horizon Europe project "Career Acknowledgement for Research (Managers) Delivering for the European Area" and in alignment with ERA Action 17.

4. Achievements

In this section, the report highlights the major achievements and milestones reached by the project so far. It includes a comprehensive overview of completed tasks, successful activities and other noteworthy accomplishments that contributed to the so-far successful implementation of the project.

List of milestones and deliverables achieved by M12:

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and Exploitation Report.

[3] The data is provided by August 2023. The Ambassador Network is a living network, therefore numbers might change in the next two years of the project 2024-2025.

Milestones by M12

Milestone N	Milestone Name	Due date	Actual date	Adaptations (if any)
1	Website launch	M4	M2	2 months ahead of schedule
2	Knowledge and Community Platform (KCP) Online	M6	M6	Deliverable D4.2 on KCP submitted in M6. Update provided in 4.3 in M12
3	Recruitment of ambassadors and communities of practice	M9	M9	National ambassadors recruited in M9. Recruitment of communities of practice planned for October- December 2023 (rationale provided in Table 1.
4	Roadmap plan	M12	M12	D3.2 Overarching Roadmap Plan

Deliverables by M12

Deliverable N	Deliverable Name	Due Date	Actual Date
D4.1	Dissemination, Communication and Exploitation (DCE) Plan	M6	M6
D4.2	Online Knowledge and Community Platform (KCP)	M6	M6
D5.1	Quality Management Plan	M6	M6
D5.2	Data Management Plan	M6	M6

D1.1	Preliminary Report on ERA-wide landscape	M12	M12
D2.1	Preliminary report on professional development opportunities	M12	M12
D3.1	Short policy brief 1	M12	M12
D3.2	Overarching Roadmap Plan	M12	M12
D4.3	Activity report on KCP and DCE	M12	M12
D4.4	Preliminary Dissemination, Communication and Exploitation report	M12	M12
D5.3	First Management and coordination report	M12	M12
D6.1	Sustainability Plan	M12	M12

Furthermore, major achievements for this reporting period have been:

- The RM Roadmap kick-off meeting, 8 September, Belgrade (Serbia) has been livestreamed. In addition to 19 participants joining in Belgrade, an additional 135 individuals joined online. The broadcast/official launch is available on the EARMA YouTube channel here with 358 unique views by end of August 2023.
- The 1st RM Roadmap Ambassador meeting, 9 May 2023, Budapest (Hungary) was also livestreamed. In addition to 20 partners and 60 RM Roadmap ambassadors joining in Budapest, 108 joined online. The broadcast/official launch is available on the EARMA YouTube channel here with 194 unique views by end of August 2023.
- Ambassador Network established with 115 Expert Research Managers as National Ambassadors. The full list of RM Roadmap ambassadors is available here.

5. Success stories and challenges encountered

This section addresses the challenges and obstacles encountered by the management and coordination team. It provides an analysis of the root causes of these challenges and their impact on the organisation's operations. Additionally, it outlines the steps taken to mitigate or resolve these challenges.

First, two main challenges have been identified during this first reporting period which are new compared to those anticipated in the project proposal and grant agreement. These news challenges have been timely and carefully addressed. The challenges are linked to the rapid evolving of the RM landscape in Europe both in connection with the European policy agenda (ERA Action 17) as well as coordination challenges with the sister project CARDEA. In both cases, the RM Roadmap coordinator has put in place mitigation measures to ensure alignment and foster communication channels. The coordinator has successfully overcome these risks but putting in place a series of risk management and risk mitigation measures which are listed below. We can confidently consider these initial challenges as success stories linked to the flourishing profession of research manager in Europe.

Table 2 Success stories based on the identification of critical risks for implementation during the first year of the project 2022-2023 (NEW compared to 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
ERA Action 17 activities and related workshops are taking place at the same time as RM Roadmap project activities. On the one hand, this empowers the overall momentum for a better recognition and understanding of the research management profession in Europe; on the other hand, regular communication flow is needed considering that activities at European and project level are developed at the same time. Some mitigation measures are presented in this table. Likelihood: High	WP1, WP3, WP5	1. RM Roadmap was represented by the project coordinator, Nik Claesen in ERA Action 17 workshops (e.g. 16 March and 10 May 2023). RM Roadmap coordinator is invited as an official stakeholder in the ERA Action 17 meetings organised by the European Commission. 2. The 1st RM Roadmap ambassador meeting, 8 May 2023, Budapest (Hungary) was organised back-to-back with the 2nd ERA Action 17 workshop on the topic of upskilling. 3. Regular communication exchanges are organised between the RM Roadmap project coordinators and EC project and policy officers. 4. The RM Roadmap plan (D.3.2) is aligning with the main pillars identified in ERA Action 17 (recognition, upskilling, networking, and capacity building).
RM Roadmap and CARDEA are two Horizon Europe projects funded by the European Commission under the HORIZON-WIDERA-2021-ERA-01 call. The two projects started in 2022 as two independent	WP1, WP2, WP3, WP4, WP5, WP6	1. The two projects collaborate on a regular basis (see Table 1) to maximise project impact and avoid undesirable duplication of efforts or results. 2. Both coordinators share the willingness to collaborate for the good of the RM community and the Research and Innovation system where synergies exist. A memorandum of understanding

competitive calls with different timelines and project deliverables. This clearly constitutes a coordination challenge between the two consortia. CARDEA started in June 2022 while RM Roadmap kicked-off in September 2022. In addition, CARDEA has a duration of 4 years compared to a duration of 3 years in RM Roadmap. While CARDEA has a strong human resources (HR) component, RM Roadmap complements with a strong network perspective. For both, the bottom-up component in the involvement of the research management community is very important. Some mitigation measures are presented in this table. Likelihood: High		is under finalisation and expected to be signed in autumn 2023.

Furthermore, the coordinator is monitoring closely the critical risks for implementation as mentioned in the project proposal and grant agreement. An update is provided below in table 3.

Table 3 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
Not enough data and/or good geographical coverage collected about research managers Likelihood: Low	WP1	RM ROADMAP partners have access to >35 EU and nationally funded projects, the informal network of European Universities, LERU, The Guild to name but a few between them. The engagement of stakeholders from the beginning of the project and their consultation during all project phases will ensure the collection of significant amounts of data and case studies.

		➤ **The ambassador recruitment initiative can already be considered a success story for this first year of the project**, primarily due to two key factors. Firstly, the quantity of ambassadors we were able to onboard exceeded our expectations (115 in total: 71 ambassadors and 44 associate ambassadors recruited by August 2023), underscoring the compelling nature of our mission and appeal to potential ambassadors. Secondly, the level of engagement exhibited by those recruited was truly impressive. Profiles recruited included: Rector, Vice rector, CEO, Chairperson, Head of Projects/Division/Research Services, Steering Board member, Director, Senior research associate, Dean, President, Manager.
Lack of participation at RM ROADMAP events/activities **Likelihood:** Low	WP2, WP4 and WP6	RM ROADMAP will ensure engagement with a wide range of stakeholders outside the project though a robust stakeholder engagement strategy that will be implemented in WP6 from the outset of the project and the extensive networks of RM ROADMAP partners. ➤ By August 2023, the project partners effectively disseminated the project's scope and outcomes in 25 distinct external events. The project's progress and achievements were communicated via 15 targeted outputs, including newsletters and articles. ➤ In addition, the consortium has created a RM Roadmap presentation Tracker to monitor the reach and influence of the Ambassadors Network where ambassadors can document dissemination activities in their respective networks (e.g., presentations in workshops, trainings, events etc.) about RM Roadmap. We anticipate to have some preliminary data by December 2023.
Lack of coordination among partners, WP and Task Leaders project **Likelihood:** Low	WP5	The consortium comprises of organisations which have previously participated in H2020 projects as well as working together on international projects; hence the coordination is expected to be stable. Additionally, the coordinator will lead regular virtual meetings with WP leads and the consortium as a whole to ensure an open and transparent communication and management process. ➤ Five meeting have been organised with WP and task leaders since the start of the project on a regular basis, every two months (09.11.2022, 07.12.2022, 23.01.2023, 08.03.2023, 07.06.2023). Agendas and meeting minutes are collected in the EMDESK common project management tool. ➤ Furthermore, the kick-off meeting has been organised in M1 (8.09.2022) of the project and the First Ambassador meeting in M9 (8.05.2023), back-to-back with two project General

		Assembly (GA) meetings. An additional GA meeting was organised online on 25 January 2023. Additional meetings have been organised with partners and advisory board members based on the current needs of the activities and priorities.
Lack of engagement of Country Ambassadors across Europe **Likelihood:** Low to medium	WP3	RM ROADMAP Ambassadors will receive: 1. First hand training on the KCP; 2. Training and mentoring on best practices within RM including best practices on creating national/regional networks; 3.Travel stipends to attend face-to-face training; 4. RM ROADMAP Ambassadors will also be in a position to apply for funding to host national meetings to promote the project; 5. Opportunities to present at project open events thus helping to promote their careers and their expertise to the wider RM network; 6. Previous project experience of partners HEFTA, NOVA & CYI. ▷ Since the establishment of the Ambassador Network in May 2023, ambassadors have received 7 regular updates by the RM Roadmap coordinator, as well as specific onboarding material (e.g. benefits, requirements, conditions, roles etc.). See onboarding document for ambassadors in Annex 2. In addition, each country has a RM Roadmap responsible partner as a first contact to ease collaboration, questions, doubts etc by email or informal online or physical meetings. The list of responsible partners and their contact details are published on the RM Roadmap website. An FAQ is prepared by the RM Roadmap consortium in the webpage. Iin addition, the coordinator has set up an internal folder for ambassadors where information from meetings, events and project related templates is gathered. This facilitated a better involvement of the ambassadors with the RM roadmap mission and its communication flow. ▷ Three training regarding the RM Roadmap Knowledge and Community Platform are established in September 2023 in view of the first co-creation session with the RM community in October 2023 about the topic of UNDERSTAND THE LANDSCAPE: NATIONAL NETWORKS AND ASSOCIATIONS (RM Roadmap timeline here). The schedule for the trainings is the following: - 18/09, 11:00 – 12:30 CET (for RM Roadmap partners, ambassadors and associate ambassadors only, recorded) - 21/09, 14:00 – 15:30 CET (for RM Roadmap partners, ambassadors and associate ambassadors only, recorded) - 25/09, 14:00 – 15:30 CET (public RM Roadmap training upon registration for wider RM community, recorded) – Registration link available here. This is a public RM

		Roadmap training for all national, regional or local communities in Europe. Ambassadors are key drivers in the dissemination of the training to their local communities, to ensure as high participation as possible.
		➢ The consortium has created a RM Roadmap presentation Tracker to monitor the reach and influence of the Ambassadors Network where ambassadors can document dissemination activities in their respective networks (e.g., presentations in workshops, trainings, events etc.) about RM Roadmap. We anticipate to have some preliminary data by December 2023.
		➢ The project consortium has established a reimbursement policy for the participation of the ambassadors in the RM Roadmap ambassador meetings. 60 ambassadors participated in the first ambassador meeting in May 2023. A second ambassador meeting is scheduled for March 2024. More information below in section 7 Resource management.

6. Resource Management

This section focuses on the effective management of resources by the management and coordination team. It includes an overview of the resources allocated, and assesses their utilisation and efficiency in supporting organisational objectives. The focus for this report is on the budget for the participation in the ambassador meetings as well as participation of advisory board members and associate partners into the meetings.

- *Budget for participation of ambassadors in the three planned ambassador meetings (schedule here).* The 1st Ambassador meeting was held in Budapest in May 2023. The project consortium succeeded in involving a high number of ambassadors to this meeting (60 out of 115). The partner in charge of local organisation was HETFA, experienced in processing reimbursement forms and large European workshops and conferences. The approach for this first meeting was truly inclusive, creating a momentum for the involvement and engagement of the ambassadors in the overall project strategy. The 2nd ambassador meeting will take place in Lisbon in March 2024. NOVA will be the local partner responsible for the practical arrangements (e.g. meeting venue, reimbursement for ambassadors etc.). The 3rd ambassador meeting is planned for November 2024 in Brussels. The project consortium will carefully analyse the resources allocated to the ambassador meetings. Should there be a financial rationale, the 3rd ambassador meeting can be held fully fledged online. The partner responsible is EARMA who is highly experienced in online meetings and workshops.
- *Budget for advisory board and associate partners*: CYI partner is in charge of the advisory board travel arrangements while EARMA covers travel arrangements for associate partners. Two advisory board members were added to the initial list of AB members to add targeted expertise, namely on research infrastructures, gender, diversity, and inclusion (see Terms of references for AB members in annex 1). To

minimise costs, many General Assembly meetings could be joined online and were recorded. All recordings are in line with the GDPR and the data management plan of the project. In addition, project kick-off meeting as well as the ambassador meeting could be joined online by partners or advisory board members who could not travel to the destination.

7. Recommendations

Based on the findings and analysis presented in the report, this section provides recommendations for improving the management and coordination functions. It suggests strategies to overcome challenges, optimise resource allocation, enhance communication, and achieve organisational goals more effectively.

Areas for improvement/recommendations:
- In view of the launch of the first co-creation exercise in October 2023 through the Knowledge and Community platform, the coordinator will establish regular bilateral meetings with the communications partners, Crowdhelix.
- In these first months of the project, emphasis has been devoted to the establishment of the ambassadors' network. The first year of the project has focused on the identification and interaction with the relevant stakeholders, actors and associations in the ambassador network: with the overall objective of building the network and finding a balance between providing project direction while allowing flexibility to the national frameworks and related actors and organisations. From September 2023 onwards, the project partners will focus on:
  - a more comprehensive assessment of the RM community, potential for a more standardised profession and terminology in the ERA-wide landscape (WP1)
  - an analysis of existing training, networking, and funding opportunities for RM as well as identifying gaps and recommendations (WP2)
  - the establishment of thematic communities of practice through a dedicated call for expression of interest in WP3 (October – December 2023),
  - Sustainability measures for the RM ROADMAP project including the sustainability of the project ambassadors (WP6)
- The project timeline is included [here](#).

8. Conclusion

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

- The project timeline is on track (only minor deviations as highlighted in section 4: Achievements).
- Main project structures are in place (Advisory Board, executive team, etc.)
- The project milestones and deliverables are timely delivered. All partners are well advanced with their concept notes and plans.
- Ambassador recruitment a success:
  - The ambassador recruitment initiative can be considered a success, primarily due to two key factors. Firstly, the quantity of ambassadors we were able to onboard exceeded our expectations

(115 in total: 71 ambassadors and 44 associate ambassadors recruited by August 2023), underscoring the compelling nature of our mission and appeal to potential ambassadors. Secondly, the level of engagement exhibited by those recruited was truly impressive. Profiles recruited included: Rector, Vice rector, CEO, Chairperson, Head of Projects/Division/Research Services, Steering Board member, Director, Senior research associate, Dean, President, Manager.

o   The gender analysis[4] conducted on the ambassador's network yielded the following breakdown:

Ambassadors:

- Out of the 71 ambassadors, 43 are female, accounting for approximately 61% of the total.
- The remaining 28 ambassadors are male, representing approximately 39% of the total.

Associate Ambassadors:

- Out of the 44 associate ambassadors, 36 are female, making up approximately 82% of the total.

- The remaining 8 associate ambassadors are male, representing approximately 18% of the total.

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[4] Disclaimer: This is a simplified gender analysis with the following limitations: (1) This is a desk exercise based on available data from the call for ambassadors done by the project team. (2) Ambassadors did not specify at application phase if they identified themselves with gender male or female. Furthermore, for the simplicity of this analysis, we have not included a third gender option which constitutes another limitation per se.

ANNEX 1 RM ROADMAP Advisory Board

RM ROADMAP Advisory Board
Terms of Reference

Version 19/05/2023

1. Purpose

1.1 The purpose of the RM Roadmap Advisory Board [AB] is to provide independent, effective, and evolving support to the RM Roadmap project over its life cycle.

2. AB Members – Nomination and Term

2.1 The initial AB membership will be established by invitation from the RM Roadmap Project Coordinator.

2.2 AB members will serve on a voluntary and non-compensated basis, and for the duration of the project through 2025.

2.3 New members may be nominated by the RM Roadmap Project Coordinator, and elected by a simple majority of the project General Assembly (GA).

3. The AB Activities

3.1 The AB will provide independent observations and assessment of the RM Roadmap project strategies and performance at milestones in the project life.

3.2 The AB will engage and provide guidance on specific project issues escalated for its visibility and potential action by the RM Roadmap Coordinator, project staff, Partners and WP Leads.

3.3 AB members will be invited to relevant project conferences, meetings, events where their expertise is relevant.

3.4 The AB will be invited to provide feedback on core project-related elements, including project deliverables, in one or several work packages based on their expertise, e.g. assessment of methodology, comments on quality, inconsistencies, identification of gaps etc.

3.4 Other forms of the AB support will be defined through continuing interaction between the AB, the RM Roadmap Project Coordinator, and project leadership.

4. TOR Evolution

4.1. This TOR may be amended in alignment with the purpose in 1.0 by approval of the AB at any meeting.

Advisory Board Members

Ana Marusic

- Tenured Full Professor, University of Split School of Medicine, since 2008.
- Chair, Department of Research in Biomedicine and Health, University of Split School of Medicine, since 2011.
- Head, Center for Evidence-based Medicine, University of Split School of Medicine.
- Co-editor in Chief of the *Journal of Global Health*.
- Chair of the Research Committee of the World Association of Medical Editors.
- Co-Chair of the Cochrane Scientific Committee.
- Founder of the Cochrane Croatia, takes responsibility for Research as its Research Coordinator.
- More than 200 peer-reviewed articles and was heavily involved with creating the policy of mandatory registration of clinical trials in public registries which helped change the legal regulation of clinical trials worldwide.
- Among other awards, Meritorious Award from the Council of Science Editors in 2016.
- Former president of the European Association of Science Editors (EASE), World Association of Medical Editors (WAME) and Council of Science Editors (CSE).

Role in RM Roadmap:
- Proposed involvement in WP1, WP3, WP5: ERA-wide landscape, Overarching Roadmap, Data Management Plan

Jan Andersen

- Chief Executive Advisor at the Technical University of Denmark since 2015, Team Coordinator for Research Support DTU.
- Expertise in research strategy and research planning in a European context.
- Advised the Rector of the Danish Technical University, Rectors and Deans of the University of Copenhagen and the former Royal Veterinary and Agricultural University on the balance between the research level, strategic policy level and the administrative level.
- Expertise in EU framework programs.
- Strong European and global network of colleagues and business partners.
- Chairman for EARMA 2010-2013.
- Founder of the COST Targeted Network and since 2013 Chair of BESTPRAC with more than 500 participants from 40 countries.
- Headed the establishment of the University of Copenhagen's research information system CURIS (PURE). CURIS became the corner-stone for the development of PURE, and has now become a part of Elsevier.

Role in RM Roadmap:
- Proposed involvement in WP2, WP3, WP4: Community of trainers, Community Incubator, Association building, Ambassadors, Overarching Roadmap, Community building

Karl Kerschbaum

- Vice Director, Regional Network Coordinator at Euresearch. Senior Legal Counsel and Research Manager at the Euresearch Regional Office Zürich.
- One of the Network Coordinators and Vice Director of the Association Euresearch.
- Legal Counsel and Research Manager EU GrantsAccess.

Role in RM Roadmap:
- Proposed involvement in WP2, WP3, WP5: Professional development, Overarching Roadmap, Management

Kathleen Larmett

- Executive Director at National Council of University Research Administrators (NCURA).
- Co-developer of NCURA's Executive Leadership Program and has worked with emerging leaders for over 20 years.
- Consults with non-profit organizations and presents workshops on topics including: Board Governance; Leadership; and How to Develop a Non-Profit.

Role in RM Roadmap:
- Proposed involvement in WP1, WP3, WP6: ERA-wide landscape, Overarching Roadmap, Sustainability of the outcomes

Kurt Deketelaere

- Professor of law at the University of Leuven.
- The Secretary-General of the League of European Research Universities (LERU), an association of twenty-one leading research-intensive universities (Oxford, Cambridge, Leiden, Leuven, Heidelberg, etc), since 2009.
- Chief legal advisor (2004-2007) and the chief of staff (2007-2009) of the Flemish Minister for Public Works, Energy, Environment and Nature.
- Chair of the Board of Directors of the Flemish Energy Regulator (VREG).
- Chair of the Flemish Environmental Damages Commission.
- Board member of a number of profit (MRBB, AIF) and non-profit (I-Cleantech) organizations in Belgium.
- Extensive number of publications in the field of EU Environmental, Energy and Climate Change Law.

Role in RM Roadmap:
- Proposed involvement in WP3: Policy, Overarching Roadmap

Thomas Estermann

- Director for Governance, Funding and Public Policy Development at the European University Association.
- Member of several European and national committees, expert groups, editorial boards, advisory groups and contributes on a regular basis to higher education management programmes and national higher education reform processes.
- Published on the topic of university funding, governance and management.

Role in RM Roadmap:
- Proposed involvement in WP3, WP6: Policy, Overarching Roadmap, Sustainability

Eduard Balbuena Longo

Representative from the CARDEA Horizon Europe project

- Profesor/Investigador/Consultor en UAB - Universitat Autònoma de Barcelona
- Head of Strategic Projects and International Programs
- Responsible for Strategic Projects and International Programs
- ICERCA - Research Centres of Catalonia

Role in RM Roadmap:
- Proposed involvement in WP1, WP2, WP3, WP6: ERA-wide landscape, Professional development, Overarching Roadmap, Sustainability

Marta Agostinho

- She currently serves as the Executive Director of EU-LIFE, an alliance of European research institutes in the life sciences that aims at promoting excellence in research and acting as a voice for research institutes in the European policy landscape.
- She holds a PhD in Cell Biology (2007) and completed post-graduation in Science Communication (2009). With more than 15 years of experience in knowledge mediation across international settings, she has held positions such as Invited Lecturer in Genetic Engineering, Director of the Communication & Training Unit at Instituto de Medicina Molecular (IMM) in Lisbon, Portugal (2008-2012), PhD Programme Manager (2007, IMM), and Project Manager (2012-2014, NOVA Medical School (FCM/UNL), Lisbon, Portugal).

Role in RM Roadmap:
- She is proposed to be involved in three work packages (WP) of the RM Roadmap: WP1, WP2, and WP3 with a focus on framework conditions, infrastructure, and advocacy.

Anđela Pepić

- Currently the Head of the Centre for Development and Research Support (formerly Entrepreneurship and Technology Transfer Centre) at the University of Banja Luka, Bosnia and Herzegovina.
- Previously worked as a project manager and researcher at the University of Banja Luka, Faculty of Political Sciences - Institute for Social Research. From 2008-2013, worked as coordinator for Bosnia and Herzegovina within the Regional Research Promotion Programme in the Western Balkans (RRPP) at the Human Rights Centre of the University of Sarajevo.
- She was Chair of COST Targeted Network 1302 BESTPRAC in the period 2018-2019 and currently BESTPRAC core group member
- She is currently Chair of the Gender Equality Advisory Board at the University of Banja Luka.

- She is also actively engaged in WBC-RRI.NET H2020 project focusing on embedding responsible research and innovation principles into the R&I landscape in Western Balkans.
- She holds a PhD in sociology (2022).

Role in the RM Roadmap:

- She serves as a gender, diversity, and equality expert on the advisory board and for the RM Roadmap project.

ANNEX 2 RM ROADMAP Ambassador Network: Onboarding materials

RM ROADMAP – The Ambassadors' Network*

RM Roadmap: Creating Framework Conditions for Research Management to Strengthen the European Research Area

An important tool for the realisation of RM ROADMAP's goals is the **Ambassadors' Network**. RM ROADMAP Ambassadors will be national or regional community builders and online moderators.

Ambassadors will be recruited for the following roles:
1. Gather intelligence and input from national and local Research Manager (RM) community, gaining their perspectives for the RM ROADMAP project;
2. Advocate for the RM ROADMAP project's prospective users and promote the project resources and services in their home country;
3. Function as online moderators to inform the co-creation of the future of research management in Europe.

The RM ROADMAP Ambassadors' Network is crucial for the project's long-term impact.

The Ambassadors' Network will both contribute to the creation of the RM ROADMAP digital Knowledge and Community Platform (KCP) and play central roles in ensuring its function and vitality.

Benefits of being a RM ROADMAP Ambassador:
1. Be part of a **unique international network of peers**, created to contribute to a strong and vibrant European Research Manager and Administrator (RM) community.
2. Access to **state-of-the-art training for RMs**.
3. Be regularly **updated on the progress** of the RM ROADMAP project.
4. Be **invited to, and reimbursed for** two **in-person Ambassador meetings** during the RM ROADMAP project period.
5. Receive **free training** in community building and facilitation.

Requirements for becoming a RM ROADMAP Ambassador:
1. Demonstrated experience as a research manager/administrator[5].
2. Experience from national network or association:
   a. In countries where RMA associations exist, written endorsement from the relevant organisation.
   b. In countries where no RMA association or network exists, experience from international RMA associations and/or networks is desirable.
3. Experience as a trainer/teacher/leader/community builder for RMA, or other relevant professional training, is desirable.

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[5] Example of research manager/administrator as identified under the HORIZON-WIDERA-2021-ERA-01 call: research policy advisers, research managers, financial support staff, data stewards, research infrastructure operators, knowledge transfer officers, business developers, knowledge brokers, innovation managers, etc. This is a not exhaustive list. The RM Roadmap project will work on a more specific definition.

Conditions:
1. The position as Ambassador is voluntary and not salaried (not requiring contract).
2. Ambassadors are recruited for the duration of the RM ROADMAP project (until 31.08.2025).
3. Ambassadors will be reimbursed for participation in twoin-person Ambassador meetings during the RM ROADMAP project period.
4. Non-disclosure agreements and signing of GDPR documents, only as required.

Ambassadors Roles:

Ambassadors are representatives of their country. They collaborate in the framework of the Horizon Europe RM Roadmap project and are expected to:

1. **Spread the project mission**, contribute to requests for inputs and dissemination of outputs**.**
2. Play a crucial role in the **development and testing of the Knowledge and Community Platform** (KCP).
3. Participate in **publishing the open call for Community of Practice (CoP) moderators**. These are active members who are practitioners, or "experts," in the specific domain of RM and participate in a process of collective learning within their RM domain/thematic group (October-December 2023).
4. Use the KCP to – together with the wider RM ROADMAP community – **cocreate online Communities of Practice** that will act as virtual central hubs for the varying RM profiles.
5. **Promote** the KCP.
6. **Create a two-way flow of information in and out of the project** – enabling feedback from the RM community as a whole, governments, researchers and important stakeholders' perspectives of the current situation of the RM profession allowing for country/regional specific factors to be considered.
7. Facilitate the **creation of networks/associations and communities** within their home countries, where such networks or communities does not already exist.
8. Take the opportunity to **present at project open events** as well as **participate as trainers** to share their knowledge and expertise.
9. Create **interest within Research Performing Organisations (RPOs), Research Funding Organisations (RFOs) and Research and Technology Organisations (RTOs)** where such interest may be lacking.
10. Contribute to the **sustainability and impact** of the RM ROADMAP outcome.

What does an ambassador need to do?

An ambassador is a community builder and extension of the consortium in first instance. The primary job of the ambassador is to make sure the information from the project flows to the relevant RM community. The ambassador is the first point of contact for the community members.

In such case that the ambassador is representing and was nominated by a certain network or association, the ambassador is expected to periodically brief that network of association.

When the online community is established on the KCP, the ambassador will stimulate the discussion during the period that a certain topic is in session. The ambassador will summarise the discussion in a text in a predetermined template and format set up by the RM ROADMAP consortium. This text will be presented to the community in the community space where the community members can anonymously either support or not support the text. The text will be exported by the consortium partner for analysis. A non-supported text might either be reformulated or fully changed on the initiative of the ambassador or the consortium.

The ambassador should advocate for the community to join the cocreation exercise in an active way and assist in the onboarding process.

An ambassador may have Associate Ambassadors to support its activities or community members to help draft the text on the KCP but the full ownership and responsibility is with the ambassador appointed by the consortium. The travel reimbursement to the ambassador meetings and/or potential in person trainings given by the RM Roadmap consortium will be exclusive to the appointed ambassador. The Associate ambassadors may also have administrator rights on the KCP for their community based on the recommendation of a selected ambassador and acceptance of the guidelines and term and conditions.

The ambassador is also very much encouraged to set up or speak at relevant national or thematic events or meetings and should report such actions to the consortium. The ambassador is in that capacity informing about the project based on information given by the consortium and on the relevant community on the KCP. The ambassador is not officially representing the project or consortium and cannot make any commitments of any kind.
The ambassadors will function more and more towards the end of the project as advisors for the Roadmap and RM value proposition.

What can Ambassadors already do after the 1ˢᵗ Ambassador Meeting, 9-10 May 2023 in Budapest

Ambassadors will be briefed and receive more detailed information and inspiration on how to engage with their respective national communities, e.g. form a group or plan for meetings at national level etc. during the 1ˢᵗ kick-off Ambassador meeting in Budapest.

Written procedure for replacement of ambassadors

Associate Ambassadors will become ambassadors in case the appointed ambassador steps down.

Each ambassador will have a dedicated Associate ambassador communicated with a confirmation email by the RM Roadmap consortium. If an ambassador steps down, they will inform the RM Roadmap relevant contact partner. The RM Roadmap consortium will confirm the replacement of the Associate ambassador to the role of ambassador.

Role of Associate Ambassadors:

The appointed ambassador is the national coordinator and collaborates with the Associate ambassadors for the organization of tasks, activities, workshops etc. at national level.

Only ambassadors are invited and reimbursed for the physical meetings. If an ambassador cannot participate to a physical meeting, they can appoint one Associate ambassador to participate in the meeting.

Associate ambassadors will have access to the recorded sessions from the ambassador meetings and other online trainings or meetings.

Associate ambassadors will collaborate closely with the ambassadors in the moderation of the discussions on the KCP. The RM Roadmap consortium will provide a dedicated online KCP training in September 2023.

Conflict of interest

By committing to the role of ambassador or Associate ambassador you confirm that you have no conflict of interest of any kind, including of commercial nature.

In case of doubt about a potential conflict of interest, please contact EARMA at projects@earma.org.

Code of conduct

The ambassador or Associate ambassador is not officially representing the RM Roadmap project or consortium and cannot make any commitments of any kind.

More information
More information about the RM Roadmap Ambassador Network is available at: https://www.rmroadmap.eu/faqs

*Version 23 March 2023