

RM ROADMAP

D4.2: Online Knowledge and Community Platform

This deliverable provides background information, the rationale and the demonstrator prototype for the RM Roadmap Knowledge and Community Platform (KCP).



RM-ROADMAP project has received funding from the European Union's Horizon Europe programme under grant agreement number 101058475.

Project full title

“Creating Framework Conditions for Research Management to Strengthen the European Research Area”

Project acronym

RM Roadmap

Grant Agreement no.

101058475

D4.2: Online Knowledge and Community Platform

RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)

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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.



RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)

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RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)

1. Summary

This deliverable provides background information, the rationale and the demonstrator prototype for the RM Roadmap Knowledge and Community Platform (KCP).

The KCP is an online platform which will be formed by integrating the EARMA's bespoke membership platform, the Research Management (RM) Helix (hosted by Crowdhelix) and will be linked to the project website.

The KCP will be a self-standing unit welcoming relevant stakeholder who will have the facility to register themselves (for free) to the platform and thereby the project. The KCP efficiently will be optimised through the following steps:

- Promote the KCP through the consortium's extensive network and through the RM ROADMAP Ambassadors who will apply to be ambassadors on the project.
- Identify gaps in current RM offerings.
- Include identified issues as debate topics in the forum area of the platform.
- Pool resources, talents, and other capabilities of the diverse range of stakeholders, thereby strengthening the RM communities.

Once online, the KCP will play the double function of knowledge access point and stakeholders meeting point.

For a more comprehensive understanding of the project, we recommend visiting RM Roadmap [website](#) to explore additional details and resources.

2. Introduction RM Roadmap

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.

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. The RM Roadmap Knowledge and Community Platform (KCP)

The RM Roadmap project has as a priority to contribute to the European Research Area (ERA) and therefore a specific focus on member states of the EU. RM Roadmap will however include most countries from the wider European zone in close collaboration with ERA countries.

The KCP is a crucial part in the RM Roadmap project. The main aim of the project is to create a plan to improve the framework conditions of research management in the ERA and the wider European zone. Improving these framework conditions is the first step towards a medium- and long-term game changer in research management to improve the ERA and European R&I system. The full project's «Roadmap» has the ambition to provide a plan to get to improved framework conditions and from improved framework conditions to the game changer.

The project will use desk studies and one or multiple surveys to gather data. In addition, RM Roadmap will do an unprecedented cocreation exercise about research management across Europe involving most countries of the larger European zone. The project intends to reach out to representatives of countries in Europe as well as to all research managers willing to participate in that country. Such a broad outreach can be made feasible through leveraging the volunteering power of the research management community in combination with a common IT environment, engaging with networks (of networks) and establishing a new ambassador network. The IT environment is the KCP. Currently, most of the networking and best practice exchange in Europe is taking place through volunteering. In most cases, this happens with the support of the employers of those research managers.

The KCP of RM Roadmap is constituted of two different systems. One for the cocreation (EARMA cocreation platform) and another for dissemination and impact acceleration (Crowdhelix RM Helix).

- The EARMA cocreation platform is an upgrade of the existing EARMA community platform.
- The RM Helix is existing and proven technology.

By working with existing technology (with an upgrade for the EARMA system), we avoid major investment in IT, implementation problems and delays. This will also help to have a feasible path toward sustainability of the community and systems. The downside is that this will require many participants to sign up to two systems. The target groups and purposes of the systems are different. The cocreation platform is predominately for research managers while the Helix is for research managers, researchers, institutional leaders, policy advisers and policy makers.

3.1 Short description of the KCP functionality

The cocreation space will create a self-service environment for research managers to have and validate a discussion on a topic (for example career paths). The system is meant to be flexible in order to facilitate discussions within the national RM context or in terms of thematic or thematic exchanges. On the online platform, participants will have the option to create online posts. Nominated ambassadors will be responsible for creating a consensus document which can be voted online by the participants in order to display:

1. The amount of people actively involved in the discussion
2. The support for the document

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Those validating the document with their vote will not be asked to fully agree with all the point of the document(s) rather if they find that the document provides improved knowledge about the status and/or majority opinion of that specific topic. Research management is still taking shape, multidimensional and very dependent on the local context. Recognising that the document provides improved knowledge about a specific topic will give a view on the reliability of the document in combination with the number of people supporting it.

It should be clear that this will be a community standpoint and not a statistical analysis nor a replacement for a survey or interviews/focus groups which will also take place in the project. The KCP reports will be standardised to a certain extent by using common templates for the discussions moderated by the ambassadors. This can provide a baseline to assess the state of research management in a specific country while also having access to the community of ambassadors. The generated knowledge can eventually feed into [ERA Action 17](#) activities "Research Management Initiative – Enhancing the strategic capacity of Europe's public research performing and funding organisations" of the European Commission (EC). Member States supporting Action 17 can also analyse the information on the KCP from other countries leading to action at the national level well before the end of the RM Roadmap project. The ability to analyse and compare will be improved by the project templates on the KCP. However, it will not be possible to compare to the level of the survey(s) and interviews. The flexibility is of importance to respect the vastly different contexts among countries and specific sensitivities of the country, region, R&I system or (RM) community.

Once online, the KCP will play the double function of knowledge access point and stakeholders meeting point. Through RM ROADMAP Ambassadors, every participating country will promote this platform to facilitate the creation of the 'professional hubs'. The maintenance and user support of the KCP will be facilitated throughout the lifespan and beyond the project end date by integrating the KCP into the EARMA existing community platform.

Please find in section 4 a more detailed technical overview of the prototype: RM Roadmap cocreation platform as an upgrade of the existing EARMA community platform.

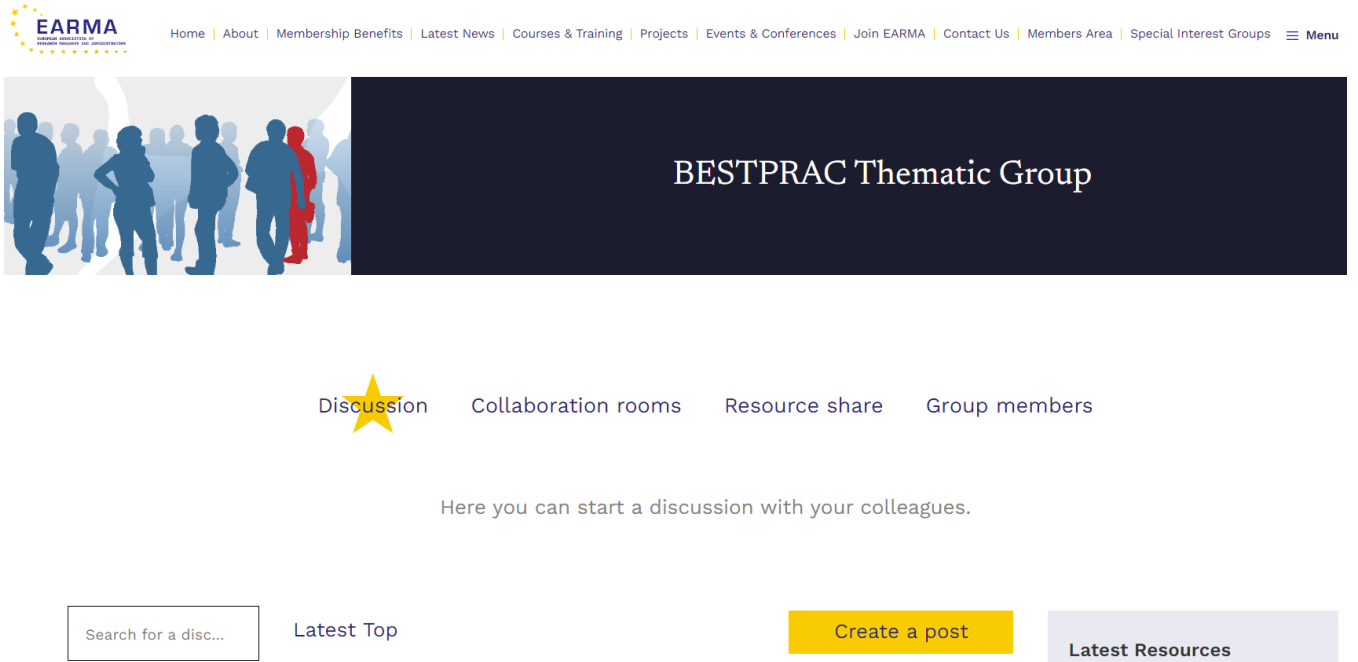


Figure 1. Existing EARMA community platform: Example of BESTPRAC thematic group

3.2 The Research Management Helix

The main purpose of the Research Management (RM) Helix is dissemination and impact acceleration. The RM Helix will allow those interested in the project but also research management in general to get information from the project. Those signed up to the RM Helix can either actively search for the available information or receive tailored information based on their profile in their mailbox. Therefore, a person could sign up at the launch of the RM Helix and be sure to receive the most important and most relevant information in their mailbox. This will allow stakeholders to follow the project without having to participate in the co-creation exercise, log into a portal frequently or even browse the project website. The RM Helix will also fully be able to process both the information of the RM Roadmap project but can also provide those signed up with information from other projects or other relevant actions. Moreover, there is the possibility to start collaborations in a smart and segmented way without having to bulk mail everyone. The smart recommender engine of Crowdhelix will only notify those participants depending on their profile as members of the RM Helix.

The RM Helix is one of a number of current Helixes. Part of the impact acceleration is that collaborators on CHX existing members of these Helixes will be invited to join the RM Helix so it will be easy for them to become involved in RM Roadmap. This is one of the ways RM Roadmap plans to achieve a large outreach. This in addition to:

- Regular communication channels (social media, website, newsletters)

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- A consortium of mainly networks (EARMA, BESTPRAC, ASTP, Crowdhelix directly and many indirectly, University Alliances, thematic networks, EURAXESS,...). Most of these are also networks of networks. EARMA for example is also linked into the Leiden group¹ (European national networks) and INORMS (Global network of Research Management Societies).

The current list of Helixes can be found here: www.crowdhelix.com/helixes

3.3 Ambassadors as connectors and community builders

The KCP also has a third part which is an online tool to find available training, networking, funding, and mobility opportunities for RM in Europe. This tool can be added later at any time but likely the delivery of this online tool will be realised by the RM Roadmap sister project [CARDEA](#) with support from RM Roadmap project partners. The objective is to avoid two tools with similar functionality.

RM Roadmap will strive to avoid unnecessary overlap in collaboration with especially CARDEA but also other relevant projects and initiatives. RM Roadmap will however explore in communication with our sister project CARDEA to see if a joint research management hub can be created bringing together the (links to the) different systems underpinned by a sustainability strategy. If such a hub is created successfully it could also be open for other projects and initiatives in RM.

3.4 Timeline

The RM Helix is fully operational and will be launched at the EARMA annual conference (April 2023) while the co-creation platform is set to begin onboarding from June to September (2023) to reach full functionality during September for the co-creation to start in October 2023.

¹ The Leiden Group is an informal network of national RM groupings in Europe with the purpose of promoting the profession, a sharing platform between RMs and their professional associations. The Leiden Group is not a replacement for EARMA nor any existing or future national RM association.

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4. Prototype: RM Roadmap cocreation platform

EARMA has started preparations for the KCP with a prototype (see below).

EARMA will engage in a competitive procedure to select the best value for money for the final KCP online community space.

In this section of the report, we have included several screenshots of the prototype which will constitute an upgrade of the existing EARMA community platform.

Join as a RM Roadmap Collaborator: Your user details

Register

Email: *

First name: *

Last name: *

Password: *

Password confirmation: *

Enter the same password as above for verification

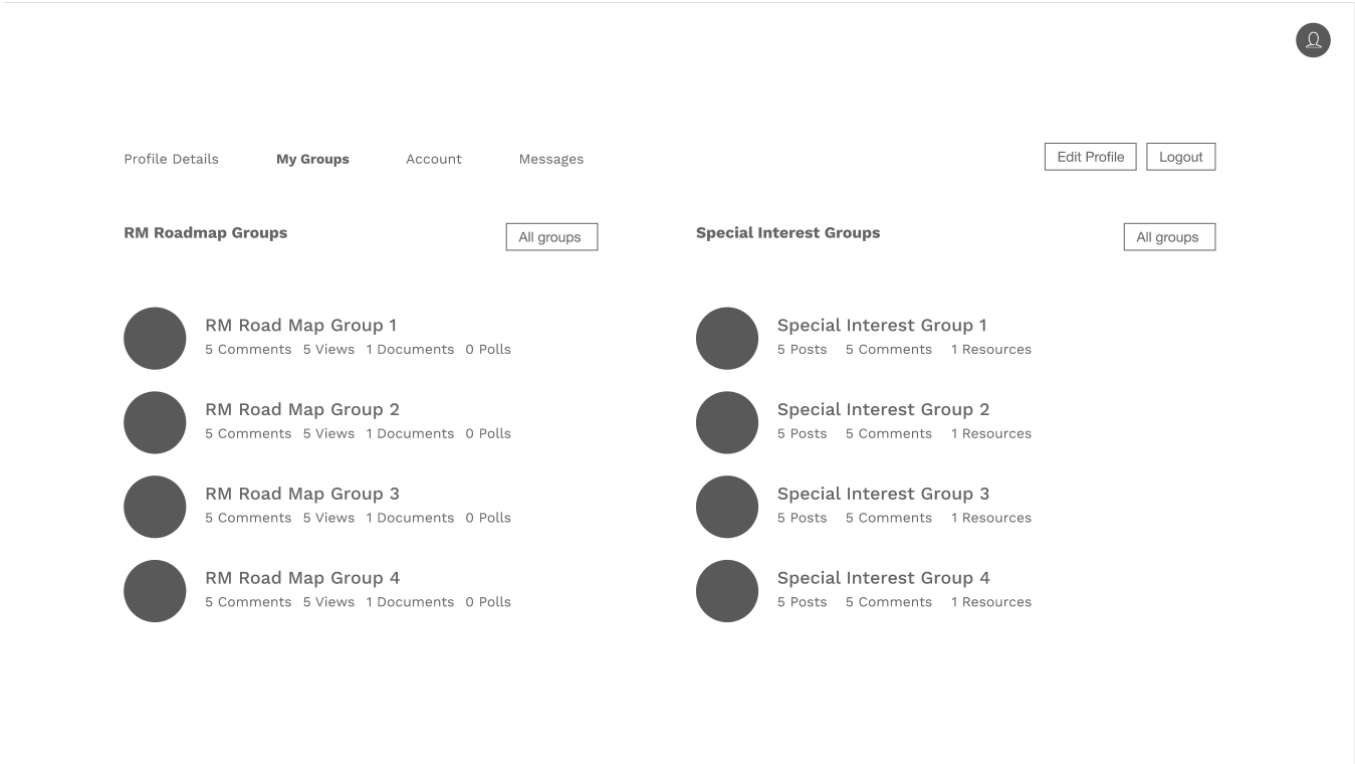
GDPR agreement: *

I accept the GDPR terms and conditions as specified in the EARMA Privacy Policy.

Continue

This page is showing the registration for the platform.

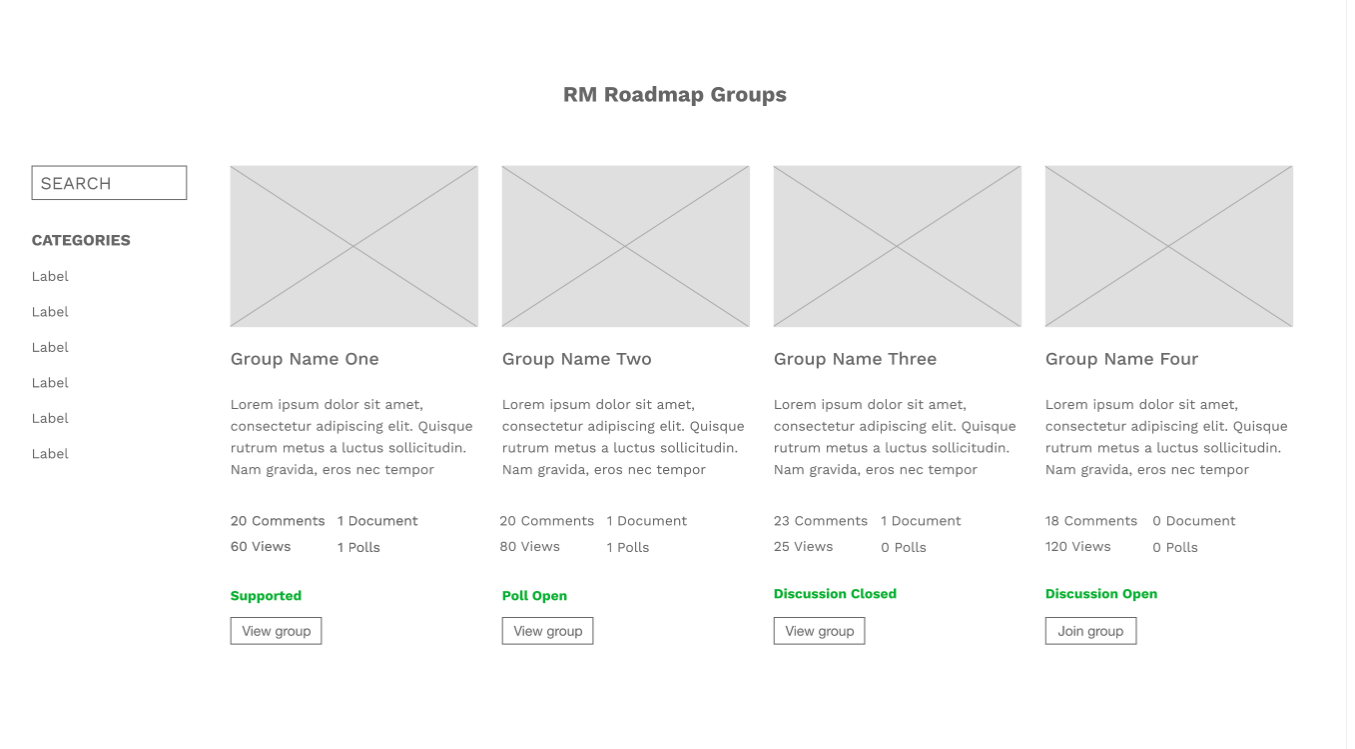
RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)



The screenshot shows a user profile interface with the following elements:

- Navigation tabs: Profile Details, **My Groups**, Account, Messages.
- Buttons: Edit Profile, Logout.
- Section: **RM Roadmap Groups** with a filter for "All groups".
 - RM Road Map Group 1: 5 Comments, 5 Views, 1 Documents, 0 Polls
 - RM Road Map Group 2: 5 Comments, 5 Views, 1 Documents, 0 Polls
 - RM Road Map Group 3: 5 Comments, 5 Views, 1 Documents, 0 Polls
 - RM Road Map Group 4: 5 Comments, 5 Views, 1 Documents, 0 Polls
- Section: **Special Interest Groups** with a filter for "All groups".
 - Special Interest Group 1: 5 Posts, 5 Comments, 1 Resources
 - Special Interest Group 2: 5 Posts, 5 Comments, 1 Resources
 - Special Interest Group 3: 5 Posts, 5 Comments, 1 Resources
 - Special Interest Group 4: 5 Posts, 5 Comments, 1 Resources

An overview of the groups the user can be involved in.




The detailed overview shows a grid of group cards with the following structure:

- SEARCH** (input field)
- CATEGORIES** (List of labels)
- RM Roadmap Groups** (Section title)
- Four group cards:
 - Group Name One**: 20 Comments, 1 Document, 60 Views, 1 Polls. Status: **Supported**. Button: View group.
 - Group Name Two**: 20 Comments, 1 Document, 80 Views, 1 Polls. Status: **Poll Open**. Button: View group.
 - Group Name Three**: 23 Comments, 1 Document, 25 Views, 0 Polls. Status: **Discussion Closed**. Button: View group.
 - Group Name Four**: 18 Comments, 0 Document, 120 Views, 0 Polls. Status: **Discussion Open**. Button: Join group.

Detailed overview of the possible RM Roadmap groups.

RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)


Group Name One


◀ All groups **Discussion** Documents Polls Group members

 Notifications On Off


Conference 2022 presentations, posters and photos **Discussion Open**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor elementum, magna enim posuere elit, id tempor lacus nunc sit amet purus. Sed tristique nec dolor non venenatis. Aliquam vulputate libero ac nisi convallis, et rhoncus enim pharetra. Nam lacinia odio in purus facilisis, at pellentesque mauris mattis. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Quisque auctor urna eu sem tincidunt, ac malesuada sem posuere. Nunc in lacus eget nisi finibus mollis. Sed suscipit dui at lorem lobortis, eu porttitor dolor hendrerit. Quisque non massa ut leo iaculis scelerisque.

20 Comments
60 Views
0 Document
0 Polls

 Posted by John Doe - Facilitator

A post in the discussion forum within the RM Roadmap group.


Group Name One

◀ All groups **Discussion** Documents Polls Group members

Announcements

Outcomes & Result Document Published

View the findings document for more information on this discussion.

View document

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor elementum, magna enim posuere elit, id tempor lacus nunc sit amet purus. Sed tristique nec dolor non venenatis.

Posted by John Doe - Facilitator 👍

Jerry Only - Contributor Online

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec

Group status

Document Published

Discussion Closed 07.02

Discussion Opened 29.01

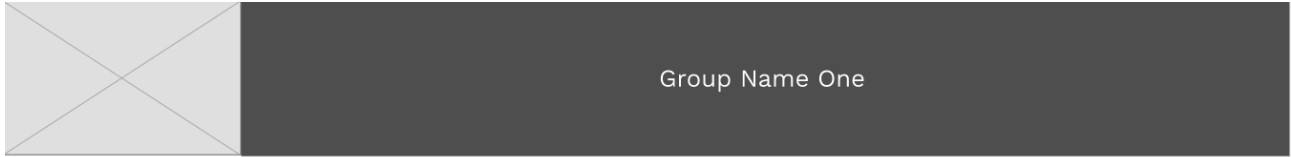
Group activity

5 Comments

In the discussion part of the group: displaying that a polling has been finalised.



RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)



◀ All groups **Discussion** Documents Polls Group members

Announcements

Polling is Open!

Click here to have your say about this very important topic.

[Vote](#)

Time remaining: 20 minutes 10 seconds

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor elementum, magna enim posuere elit, id tempor lacus nunc sit amet purus. Sed tristique nec dolor non venenatis.

Posted by John Doe - Facilitator



Jerry Only - Contributor

Online

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Group status

Polling Open

Document Published 12.02

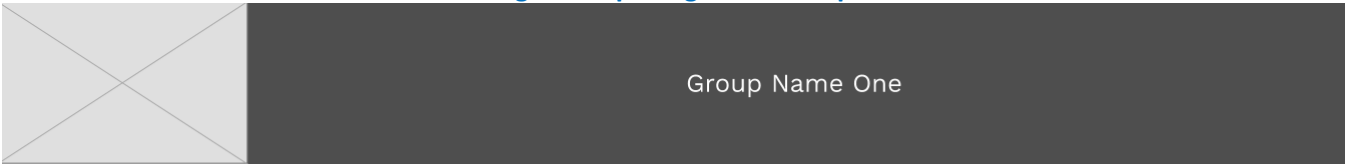
Discussion Closed 07.02

Discussion Opened 29.01

Group activity

5 Comments

Showing a new polling has been opened.



◀ All groups **Discussion** Documents Polls Group members

Outcome Supported.

Review the poll results ahead of the final group decision.

[View poll results](#)
 [View document](#)

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor elementum, magna enim posuere elit, id tempor lacus nunc sit amet purus. Sed tristique nec dolor non venenatis.

Posted by John Doe - Facilitator



Jerry Only - Contributor

Online

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Group status

Supported 15.02

Poll Closed 15.02

Polling Open 14.02

Document Published 12.02

Discussion Closed 07.02

Discussion Opened 29.01

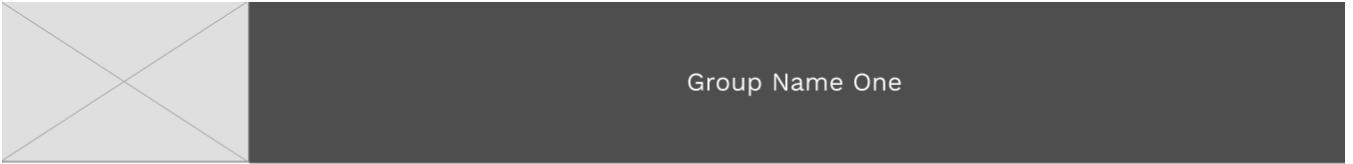
Group activity

5 Comments

Showing outcome of a polling.



RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)



◀ All groups Discussion **Documents** Polls Group members

[Upload a resource](#)

Search

CATEGORIES

Label

Label

Label

TAGS

Label

Label

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor

CATEGORY

Uploaded by Posted by John Doe - Facilitator

Conference 2022 Pocket Programme

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CATEGORY

Uploaded by Posted by John Doe - Facilitator

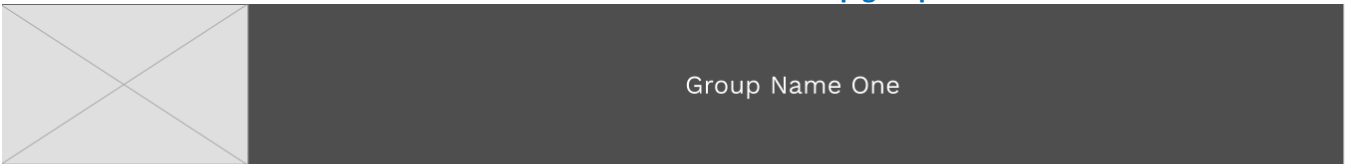
Conference 2022 Photographs

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CATEGORY

Uploaded by Posted by John Doe - Facilitator

Documents shared in a RM Roadmap group.



◀ All groups Discussion Documents **Polls** Group members

[Draft Polls](#) [Create a Poll](#)

[Edit Poll](#) **Take the poll!** [56 Votes Cast](#)

Time remaining: 20 minutes 10 seconds

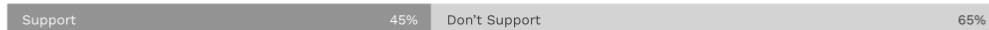
Nam gravida, eros nec tempor elementum, magna enim posuere elit, id tempor lacus nunc sit amet purus.?

Support Don't Support

Vote

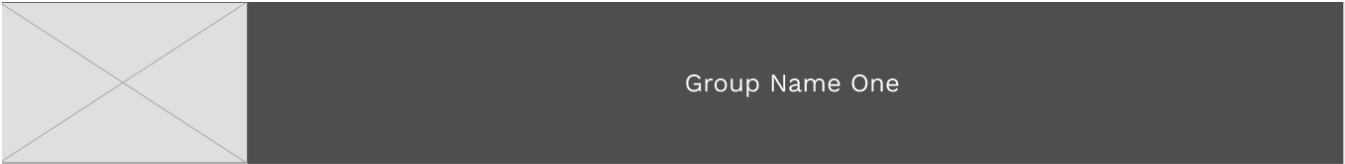
Conference 2022 presentations, posters and photos Closed 14.02

Sed tristique nec dolor non venenatis. Aliquam vulputate libero ac nisi novallis, et rhoncus enim pharetra?



Overview of the poll, showing how much time is remaining and the options to vote.

RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)



◀ All groups Discussion Documents **Polls** Group members

Conference 2022 presentations, posters and photos Closed 14.02

Sed tristique nec dolor non venenatis. Aliquam vulputate libero ac nisi convallis, et rhoncus enim pharetra?



[56 Votes Cast from 76 Members](#)

Conference 2022 presentations, posters and photos Closed 14.02

Quisque rutrum metus a luctus sollicitudin. Nam gravida, eros nec tempor?



[66 Votes Cast from 76 Members](#)

Showing detailed outcome of polling.

Discussion Documents **Polls** Group members Announcements

[Draft Polls](#) [Create a Poll](#)

Title:*

Description:*

Start time:*

2023-22-02 00:00

End time:*

2023-22-02 00:00

Timezone:*

GMT

Option:*

Ordering:*

Delete?

[+ Add a Poll Option](#)

[Save](#) [Save & Publish](#)

Showing the page where the polling is created.

RM Roadmap_EARMA_WP4_D4.2_Online Knowledge and Community Platform (KCP)

The full link to the screenshots of the prototype is available here: <https://xd.adobe.com/view/54ab2655-3e44-4a66-a974-094175370fd4-01f8/grid/>.

5. More on the RM Helix hosted by Crowdhelix (CHX)

Crowdhelix is an online collaboration platform that connects businesses, universities, funding agencies and research organisations from around the world. The platform is designed to help users develop project concepts, collaborations, target funding, and deliver cutting-edge projects such as those funded through Horizon Europe. Using Crowdhelix's custom-built collaboration platform, users can join topic-focused international communities called 'Helixes'. These Helixes are usually coordinated by leading research organizations in their respective fields and map directly to Horizon Europe's Clusters and Mission areas.

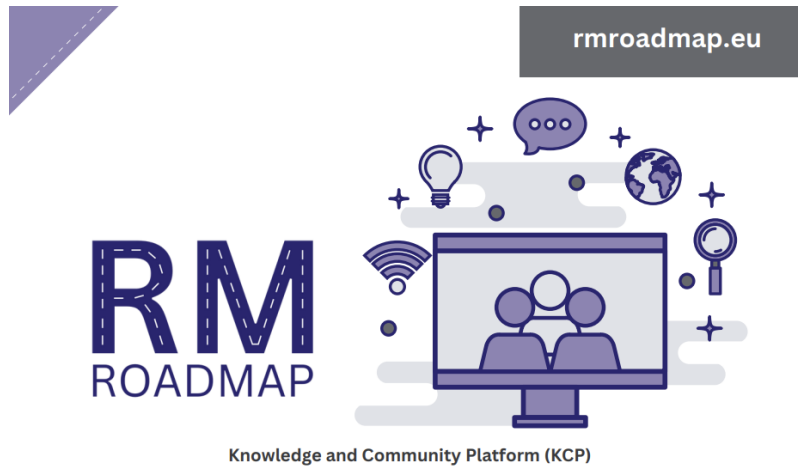
Within the Helixes, users can proactively post and respond to collaboration opportunities and target specific Horizon Europe funding calls drawn directly from the EU's database. Crowdhelix makes it quick and easy for diverse businesses, universities, and research organizations to find common ground, forge strong partnerships, and collaborate effectively.

The added value of having Crowdhelix on this project and one of their key strengths is their innovative recommender engine. This advanced technology identifies and recommends the most suitable partners for your project based on various criteria, including expertise and experience. Recently, Crowdhelix have made a significant upgrade to their recommender engine to provide users with an even better experience. The new engine is designed to match user interests on a much more precise level, with the ability to identify relevance between even more words than before. This means that users can expect to receive recommendations that are not only more accurate, but also more comprehensive. This post on twitter explains the upgrades. [Twitter post](#)

Crowdhelix provides an online user guide to help users effectively use their system and make the most of the features available. It offers step-by-step instructions on how to create a profile, search for partners, and submit project proposals. Additionally, the user guide provides tips on how to optimize searches to find the most relevant partners for your project. [Crowdhelix User's Guide](#)



Annex 1 Knowledge and Community Platform in a nutshell



EARMA and partners are working together to present the Research Management (RM) community with an exciting new online co-creation space. The **RM Roadmap** Knowledge and Community Platform will bring research managers and administrators (RMAs) together to shape the future of the profession as part of a European Union funded project that will support the strengthening of an inclusive research management community in Europe.

What is it?

It's a place where RMAs can share their views, information on available training, funding and introduce issues for discussion in a solution-focused endeavour that will seek to build recognition for the profession by understanding the needs of the community. Not just another forum, it is a combination of EARMA's website and the Crowdfelix platform. It will be all about research management and the issues faced by the professionals who provide excellent research support.

Who is it for?

You are the expert. That's why we need to hear your views as part of this ambitious consultation process. Research management includes a broad range of professionals supporting researchers to achieve excellence in research and we want to include the full variety of individuals that make up the RM community. Stand up, be counted and share your experience on the RM Roadmap Knowledge and Community Platform.

What is RM Roadmap?

The RM Roadmap project will 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, sustain its economic performance and work towards recognition of the profession in Europe.

Where can I find the RM Roadmap Knowledge and Community Platform?

Visit the project website rmroadmap.eu to access the Knowledge and Community Platform for free.





RM ROADMAP

 rmroadmap.eu

 [@rmroadmap](https://twitter.com/rmroadmap)

 linkedin.com/company/rmroadmap



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