RM ROADMAP

Deliverable 4.3. Activity report on Knowledge and Community Platform (KCP) and Dissemination, Communication, Exploitation (DCE)

This deliverable provides background information, the rationale and the demonstrator prototype for the RM Roadmap Knowledge and Community Platform (KCP). This report is prepared in month 12 of the project (August 2023) and is an update of deliverable 4.2 prepared in month 6 (February 2023).

The information about Dissemination, Communication, Exploitation (DCE) is provided in D4.1 (February 2023) and D4.4 (August 2023).

WP4, Community, Communication, Dissemination, EARMA

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Project full title

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

Project acronym

RM Roadmap

Grant Agreement no.

101058475

D4.3 Activity report on the KCP and DCE

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1. Summary

This deliverable provides background information, the rationale and the demonstrator prototype for the RM Roadmap Knowledge and Community Platform (KCP). It builds upon D 4.2 "Online Knowledge and Community Platform (KCP)" which was submitted in February 2023.

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 efficiency will be optimised through the following steps:

- Promote the KCP through the consortium's extensive network and through the RM ROADMAP Ambassadors Network (more information here).
- 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[1] 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

[1] https://www.rmroadmap.eu/

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. As a matter of fact, by August 2023, 116 RM Roadmap ambassadors and associate ambassadors have been recruited from 40 countries in Europe (full list here).

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 co-creation 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 co-creation 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 co-creation 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 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

Participants validating the document with their vote will not be asked to fully agree with all the point(s) of the document(s), rather if they find that the document provides improved knowledge about the status and/or majority opinion on that specific topic. Research management is still taking shape, multidimensional and very dependent on the local context. Recognising that the consensus 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[2] 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.

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' at national level with the country communities and thematic level with the communities of practice. The maintenance and user support of the KCP will be facilitated throughout the lifespan and beyond the project end date by integrating the KCP (see section 4) into the EARMA existing community platform (see Figure 1).

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

[2] https://earma.org/news/why-your-member-state-needs-support-action-17/

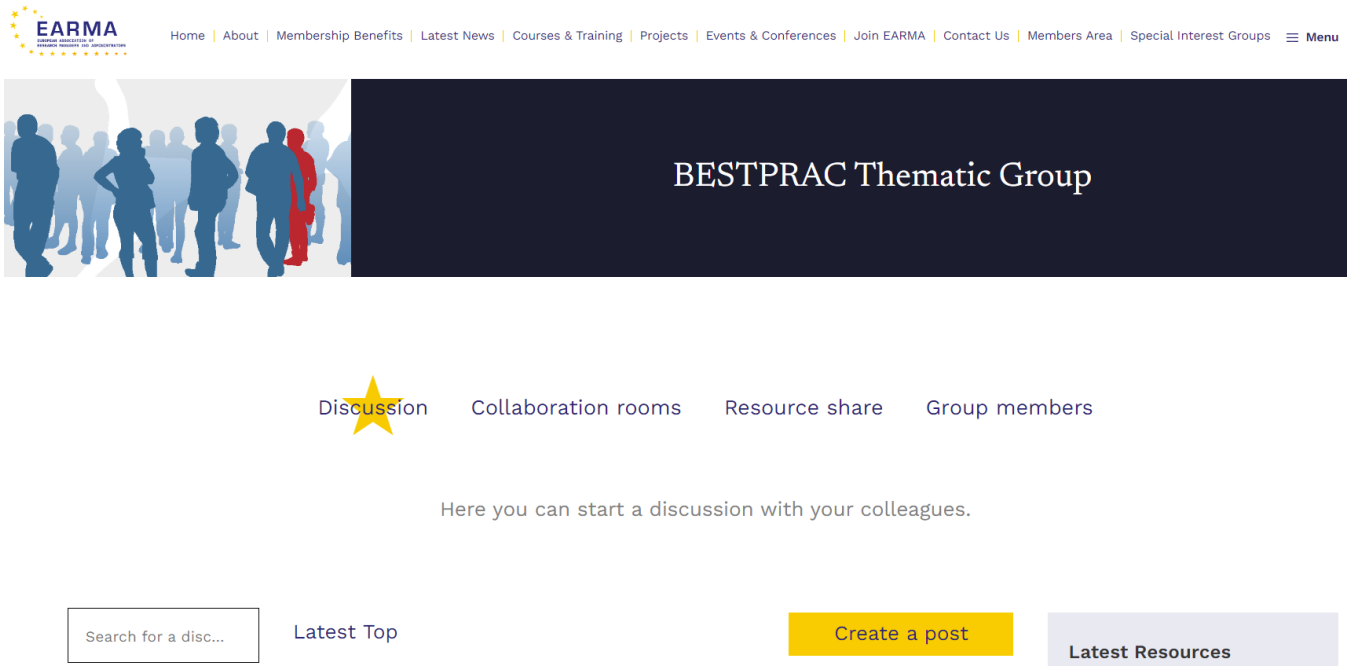


Figure 1. Existing EARMA community platform: Example of BESTPRAC thematic group

Figure 2. RM Roadmap groups

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 managers in general to get information from the project. Participants 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 Crowdhelix 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)
- A consortium of mainly networks (EARMA, BESTPRAC, ASTP, Crowdhelix directly and many indirectly, University Alliances, thematic networks, EURAXESS, etc.). Most of these are also networks of networks. EARMA for example is also linked into the Leiden group[3] (European national networks) and INORMS (Global network of Research Management Societies).

Following the official launch of the Research Management Helix platform at the 2023 EARMA Conference in Prague, the RM helix has gained considerable traction. By the end of August 2023, an influx of 310 experts is reached, each bringing their unique expertise from a total of 169 distinctive organisations. The platform has registered members from as many as 54 countries.

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

Online tool on available training, networking, funding, and mobility opportunities for RM in Europe

The KCP can be considered closely linked to a third online tool which has its main objective to find available training, networking, funding, and mobility opportunities for RM in Europe.

RM Roadmap will strive to avoid unnecessary overlap with existing tools - especially in collaboration with the Career Acknowledgement for Research (Managers) Delivering for the European Area (CARDEA) project - but also other relevant projects and initiatives. RM Roadmap will explore, in communication with our sister project from the same call (HORIZON-WIDERA-2021-ERA-01-20 CARDEA), if a joint research management hub can be created bringing together the different systems underpinned by a sustainability strategy. If such a hub would be created successfully it could also be open for other projects and initiatives in RM. RM Roadmap and CARDEA have already established collaboration that will set up and be formalised in a Memorandum of Understanding (MoU). RM Roadmap is very actively collaborating with CARDEA; the MoU between the two projects is under preparation, its signature expected for autumn 2023.

This tool can be added later, at any time in RM Roadmap, but its delivery will be likely 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.

[3] 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.

3.3 Timeline

The RM Helix is fully operational by August 2023 and was launched at the EARMA annual conference (April 2023) while the co-creation platform is set to begin onboarding in September (2023), to reach full functionality during September for the co-creation to start in October 2023. To ensure all ambassadors and associate ambassador are familiar with the Knowledge and Community Platform, and well-prepared for the first online co-creation session scheduled for October 2023, we have organised two training days on the 18th and 21st of September for RM Roadmap ambassadors, associate ambassadors, and consortium members. An additional public training session for the wider RM community is scheduled on the 25th of September (more information here). The content for all sessions will be the same: to provide (or: equip) all participants with a detailed explanation of the functionalities of the online co-creation platform.

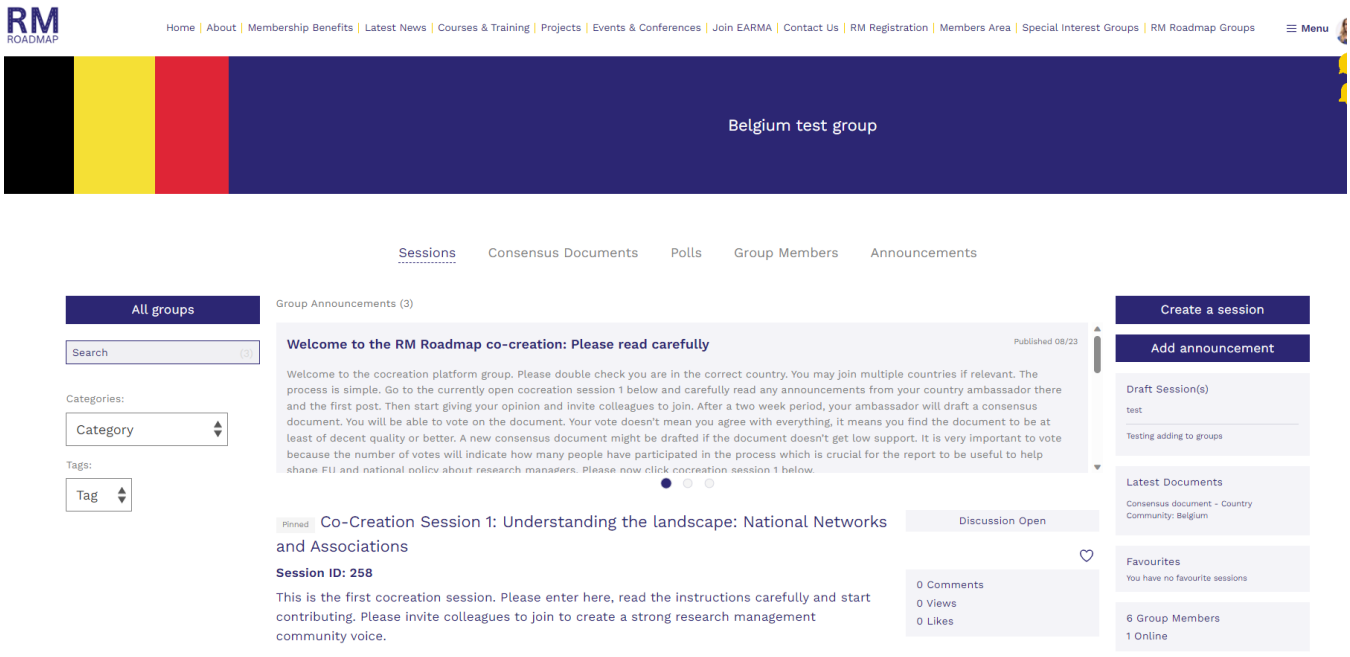
Building on the momentum, the project aspires to carry out a series of five online co-creation exercises over the course of its duration. The preliminary exercise is slated for 2023, followed by three comprehensive exercises in 2024, and culminating in a final exercise in 2025. To read the full timeline, please click here.

4. Prototype: RM Roadmap cocreation platform

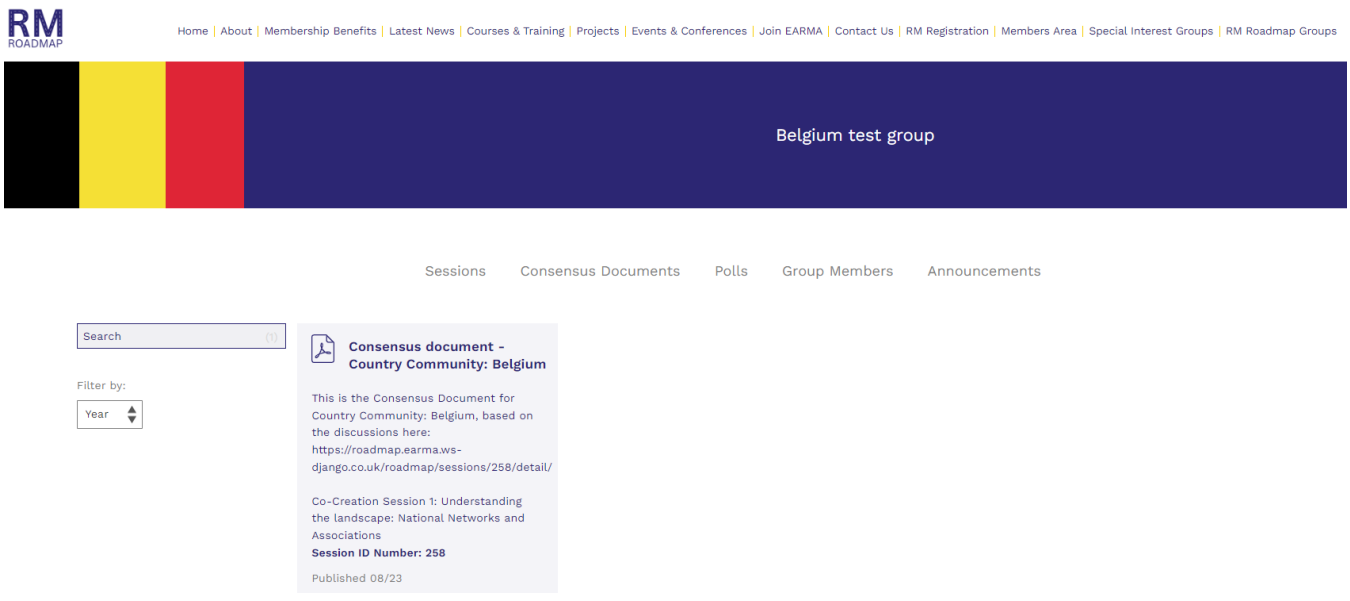
EARMA has started preparations for the KCP with a prototype (see below). EARMA have engaged in a competitive procedure to select the best value for money for the final KCP online community space. In this section of the report, we have included several screenshots of the prototype which will constitute an upgrade of the existing EARMA community platform.

1. ***Once logged in, users will be able to search for specific groups which can be sorted by "communities of practice" and "country communities".***

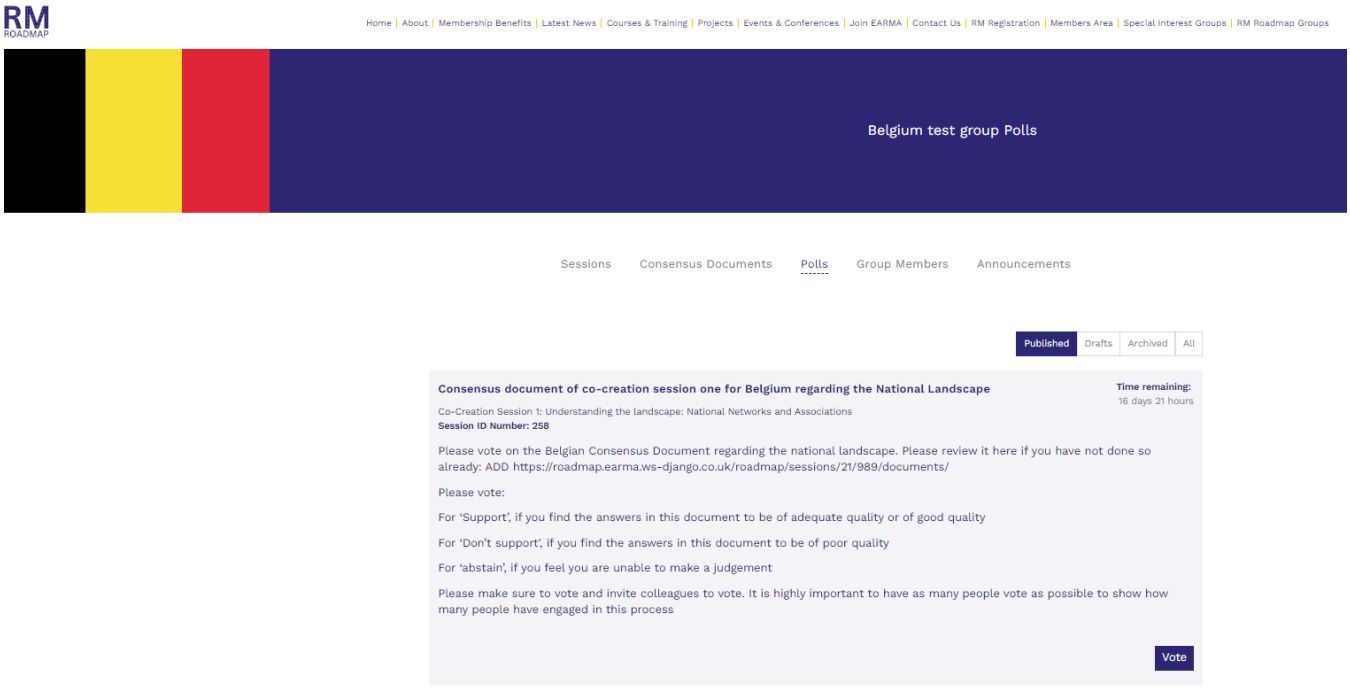
2. ***Once the user joins one of the groups, e.g. a "Country communities", he/she can have access to available sessions, consensus documents, group polls, group members and announcements. Only ambassadors will have the option to create a new session.***



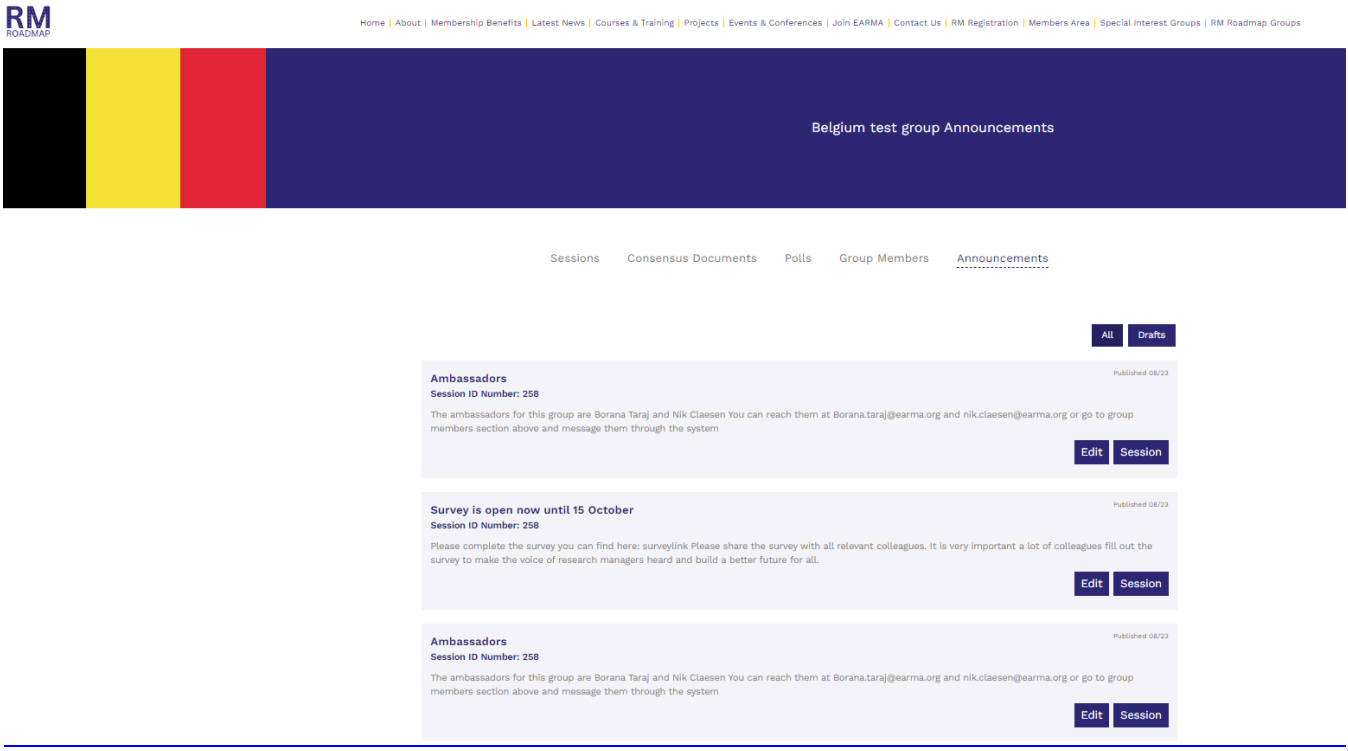
3. ***When users select "Consensus document" tab, they will see the list of all produced consensus documents for that specific group.***



4. ***When users select "Polls" tab, they will see the list of all polls for that specific group. In addition, they will be able to vote.***



5. ***When users select "Announcements" tab, they will see the list of all announcements for that specific group. Only ambassadors or administrators will be able to make group announcements.***



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 organisations in their respective fields and linked 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 organisations 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 Twitter post explains the upgrades.

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 Crowdhelix User's Guide provides tips on how to optimise searches to find the most relevant partners for your project.

Annex 1 Knowledge and Community Platform in a nutshell

rmroadmap.eu

RM ROADMAP

Knowledge and Community Platform (KCP)

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 Crowdhelix platform. This co-creation platform 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.

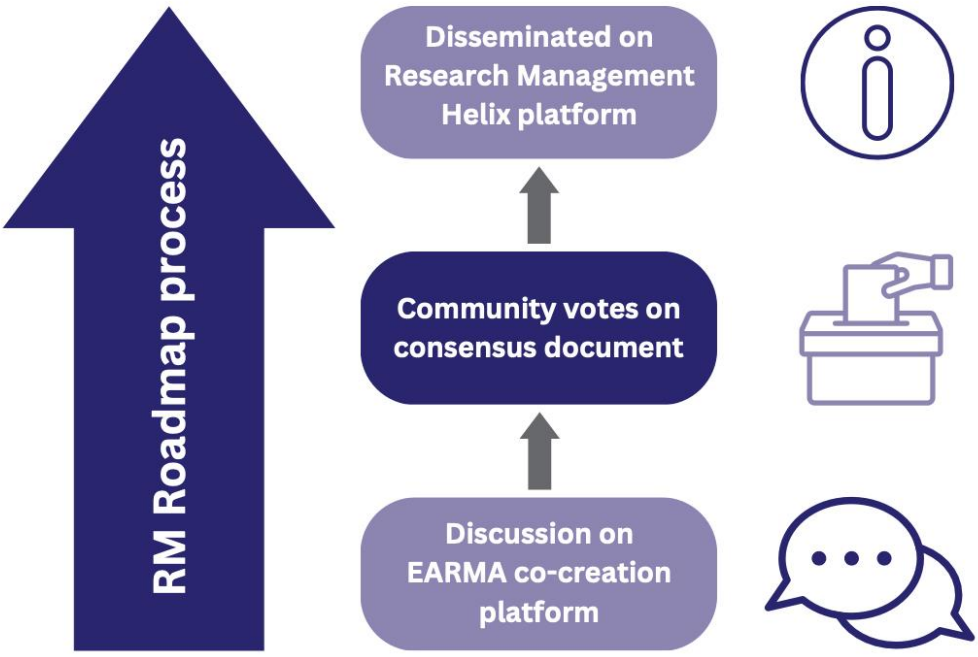
Where can I find the RM Roadmap Knowledge and Community Platform?
Visit the project website **rmroadmap.eu** to access the Knowledge and Community Platform for free.

rmroadmap.eu

RM ROADMAP

KCP in practical terms

National communities will discuss RM topics on the EARMA co-creation platform. These discussions will be concluded by a consensus document that the community members can vote on. The outcomes will be disseminated on the Research Management Helix. The Helix will also contain other relevant RM news and developments (of other projects).



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