

Certificate in Research Management: Advanced (research organisations)

The Certificate in Research Management: Advanced (research organisations) has been designed to provide an insight into the technical elements of research management. It builds on the Certificate in Research Management: Foundation and looks in greater depth at the different roles and activities within the research management profession. It seeks to develop in students a broader view of the issues, not just from their own role, but from the wider organisational and sector position. The Advanced Certificate will help students to develop skills and behaviours that they need to continue to progress in their career.

Students are likely to have experience in research management, and specific responsibilities within their department or unit. They will be keen to develop their professional skills and may be at the early stages of their journey towards a leadership role. Some students may be new to the profession but will bring relevant and transferable experience from other roles.

By completing the Advanced Certificate, students will:

- Develop a strategic view of the challenges facing the sector in their country
- Develop technical and professional skills that can be put to use within their organisations
- Build and deepen their knowledge about the key roles and activities within the profession
- Build a network of peers from across the sector

The Advanced Certificate consists of **four mandatory units** and **two optional units**. Units have been designed with elements that relate to other units on the course, enabling a coherent whole. These connections will be discussed during the unit webinar.

Mandatory modules:

- ***Developing research policy and strategy*** - designed to help students develop their knowledge and skills in relation to strategy and policy.
- ***Equality and Diversity in Research Management*** - designed to help students to understand, explain and evaluate the importance of equality and diversity in research management.
- ***Research Governance*** - designed to help students to understand the role of good governance in research management.

- ***Managing a funding portfolio*** - designed to help students gain the knowledge and skills to evaluate and expand the funding policy of their organisation, in order to identify and plan new funding opportunities.

Optional units (choice of two):

- ***Delivering results: people, systems and processes*** - designed to help the student build their skills and understanding of how people, systems and processes can work together to deliver a valuable service.
- ***Managing collaborations*** - designed to help the student gain the skills and understanding they need to support successful collaboration.
- ***Data for Decision Making*** - designed to help students develop knowledge and skills in working with data to provide useful management information.

Each module is assessed through an assignment, drawing on the guided and informal learning the student will have done in relation to each unit and using examples from the student's workplace. Students must pass all six units to complete the Certificate. The Advanced Certificate can be completed in as little as nine months, although students can take up to two years if needed.

The Advanced Certificate is a self-guided course and has been designed for members of ARMA and our sister associations. Students will be part of a cohort, and will work through the units with a mentor, their own line manager, their cohort, and their wider network. They will be expected to undertake some guided learning, with their mentor and through workshops and events. The majority of time will be spent on informal learning. They will be able to access online resources to help them complete the units. They will also learn from colleagues in the workplace, and from their peer network.

Two different models of studies are available, suited to the requirements of the student:

- **Pathway 1:** includes a tailored workshop and supporting webinar for each mandatory module, and webinar support for the optional units. Students can access online resources. They may also attend other workshops to supplement their learning.
- **Pathway 2:** this is an online-only course, with webinar support available for all units and access to online resources. Students will be expected to attend relevant workshops to supplement their guided learning.

ARMA's Certificate in Research Management: Advanced is awarded by the ATHE and regulated by Ofqual. It has been assessed as level five of the UK Regulated Qualifications Framework. This means it meets nationally-recognised quality guidelines and offers a qualification equivalent to an English Higher National Diploma.

CRM Advanced: Mandatory Units

Supporting research policy and strategy

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

This initial unit is designed to help students develop their skills in relation to understanding and supporting strategy and policy. A strategic mindset means thinking about things in a different way, focusing on the impact and outcomes of activities rather than the inputs. Understanding the broader policy environment is essential when considering any strategic development. By the end of the unit, the student should be able to demonstrate a clear understanding of strategy and policy, how they interact, and what is required to support development and implementation.

Learning outcomes:

- To understand the difference between strategy and policy, and how they interact
- To understand the activities, roles and skills involved in developing strategy and policy
- To understand how to contribute to the successful development and implementation of policy and/ or strategy

To pass the unit, the student should address the following assessment criteria:

- Explain the relationship between strategy and policy, how they differ and how they interact
- Explain the key stages of developing a strategy and/ or policy and the skills you might need at each of these stages
- Assess the external operating environment and evaluate the impact of key elements
- Identify stakeholders and understand how and when to engage and manage them
- Describe good practice in drafting an effective policy and/ or strategy document
- Explain different ways successful implementation can be monitored and evaluate the effectiveness of different approaches
- Explain how to communicate a new strategy or policy

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **You should choose an example of a strategy or policy you have been involved in. If you have not get been involved in this activity, you should describe how you would approach the development of a new strategy or policy that would benefit your organisation.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting

notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- How can you find out about strategy and policy? What external strategies and/ or policies might you need to consider when thinking about developments within your organisation? How would you evaluate a good or bad example?
- What are the different elements involved in successfully developing and implementing a strategy or policy? How do you find the information you need to inform each of these elements? What is the best way to pull the document together? What else should a strategy or policy involve?
- What is your role in strategy and policy development? How will you develop the knowledge and skills you need to make an effective contribution? What will these skills bring to the rest of your role?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading).
- Cohort discussions: F2F event (6 hours guided learning) and webinar (2 hours guided learning). *Participation depends on pathway.*
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops, including those delivered by ARMA and other organisations. The ARMA **Developing Research Strategy** workshop is relevant for this unit and counts as 6 hours towards your learning requirements (guided learning).

Equality and diversity in the research environment

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

This unit is designed to help students to understand, explain and evaluate the importance of equality and diversity in the research environment. Each country will have their own equality and diversity framework and/ or regulations that will guide decisions within the profession, and research management professionals should develop an understanding of how to support researchers working in different countries, and with colleagues from different cultures. By the end of this unit, the student should be able to demonstrate a clear understanding of the challenges and benefits of equality and diversity in the research environment and be able to play a positive role in supporting progress towards a diverse research culture.

Learning outcomes:

- To understand the benefits, challenges and implications of considering equality and diversity in research and research management
- To assess the diversity of the culture within their own organisation
- To understand their role in supporting progress towards a more diverse research culture, within their organisation and more widely within the research environment

To pass the unit, the student should address the following assessment criteria:

- Explain the importance of equality and diversity in a healthy research environment
- Assess the implications of not supporting a diverse research culture
- Describe the role equality and diversity plays in different research activities
- Understand the role transparency plays in relation to equality and diversity
- Assess how their own organisation performs in relation to equality and diversity, and identify opportunities for improvement
- Explain their own role in ensuring a diverse research environment

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- Why is equality and diversity important for a healthy research environment? Think about how equality and diversity changes as career levels progress, and the impact that this might have on decision making. What does this look like in your own organisation?
- How does your organisation perform in relation to equality and diversity? How does this performance rank against other examples? Can you find exemplars that would work in your organisation? You might think about how well equality and diversity is integrated into your processes, such as developing a funding proposal, managing a research portfolio, or creating new funding schemes.
- How might you measure the effectiveness of equality and diversity policies in your organisation? How would you put this measurement into practice?
- What can you do, on an individual and team level, to contribute to equality and diversity in the research environment? For example, how do you manage unintentional bias in your own decision making and protect against challenges?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading).
- Cohort discussions: F2F event (6 hours guided learning) and webinar (2 hours guided learning). *Participation depends on pathway.*
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops, including those delivered by ARMA and other organisations. Workshops and other training events count towards your guided learning hours.

Research Governance

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

This unit is designed to help students to understand the role of good governance in research management. Ensuring good research practice and the application of due diligence means that governance is now a crucial element of the research environment. Performance in different areas of governance will have implications for the reputations, quality and revenues of all research and funding organisations. And different countries will have different legal and regulatory requirements. By the end of this unit, the student should be able to explain why good governance is important to research and evaluate how their own organisation approaches research governance.

Learning outcomes:

- To understand the importance of good research governance
- To understand the governance framework (legal, regulatory and policy) in which their organisation operates
- To understand their own role in ensuring good research governance

To pass the unit, the student should address the following assessment criteria:

- Explain what good research governance looks like, why it is important, and the implications of not delivering it
- Explain the legal, regulatory and policy framework that their organisation works within
- Assess the efficacy of the ways in which their organisation responds to that external framework
- Evaluate the processes for monitoring good governance and identify opportunities for improvement
- Explain their own role within research governance

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this unit, students should pick an example from their own organisation that they can use to demonstrate research governance. Examples might include an approach to due diligence for international collaborations or evaluating governance in relation to funding schemes.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What is good research governance to your own organisation and within your own country? What particular aspects are most relevant to your role? What might happen (to you, or your organisation) if governance fails? You might want to find different examples of good and bad practice to help your consideration.
- Where would you find out about different elements of your country's governance framework (legal, regulatory and policy requirements)? What are the best ways to keep up to date? How has your organisation translated and implemented different elements of the external framework? What gaps are there, and how could they be filled?
- What might your own role be in contributing to and supporting good research governance? What skills do you need to deliver this role? How might you develop these skills?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading).
- Cohort discussions: F2F event (6 hours guided learning) and follow-up webinar (2 hours guided learning). *Participation depends on pathway.*
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops, including those delivered by ARMA and other organisations. Workshops and other training events count towards your guided learning hours.

Managing a funding portfolio

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

The focus in research offices, whatever type of organisation they are in, has shifted from individual projects to broader portfolios. Funding is no different, with different schemes falling within an organising theme or portfolio. This creates an environment where funding is available for varying timescales, whereas strategy and staff contracts are part of a different timeframe. This unit has been designed to help students gain the knowledge and skills to evaluate and expand the funding policy of their organisation, in order to identify and plan new funding opportunities, within a strategic and resourcing framework. By the end of the unit, students should be able to demonstrate a clear understanding of how to create, manage and evaluate a portfolio of funding within their organisation.

Learning outcomes:

- To understand the funding environment and be able to identify opportunities for new funding portfolios and/ or schemes
- To understand what a successful portfolio looks like
- To understand how to implement, manage and evaluate a funding portfolio, in relation to the organisational strategy

To pass the unit, the student should address the following assessment criteria:

- Evaluate the funding environment and determine the strengths and weaknesses of your organisation's existing funding portfolio(s)
- Identify a new funding portfolio, or scheme within a portfolio
- Explain what a proposal for a new funding portfolio or scheme would look like
- Describe the key stages in introducing a new funding portfolio or scheme, including development, implementation, management and monitoring
- Assess the risks involved and describe your approach to manage those risks
- Evaluate key stakeholders and explain how they would be engaged
- Evaluate the success of the portfolio or scheme in relation to your organisation's strategy

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this unit, the student should focus on a new opportunity, rather than reflect on something that has already happened. The assignment can then be used as the basis for a business case for a new funding portfolio proposal.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What is the purpose of a funding portfolio? Think about how a funding portfolio might drive different behaviours. What does success look like?
- What does the funding landscape currently look like? How would you go about identifying gaps and opportunities? You might think about a SWOT and/ or PEST analysis as a basis for your consideration, using your organisation's strategy to inform your evaluation.
- What skills do you need to manage a funding portfolio? Where should you look for information and expertise? Who do you need to engage in the process, and when?
- What challenges are there in managing a funding portfolio? What different factors do you need to take into account?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading).
- Cohort discussions: Webinar (2 hours guided learning)
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you should attend other Training & Development workshops, including those delivered by ARMA and other organisations. Workshops and other training events count towards your guided learning hours.

Delivering results: people, systems and processes

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

In a challenging economic climate, effective delivering is critical to the success of an organisation. This unit has been designed to help the student build their skills and understanding of how people, systems and processes can work together to deliver a valuable service. The student will be asked to focus on an opportunity for improvement and use the assignment as the basis for a business case for the initiative. By the end of the unit, the student should be able to identify opportunities, develop a plan and implement change.

Learning outcomes:

- To understand what effectiveness looks like in your organisation
- To be able to identify opportunities for improvement
- To understand how to plan, implement and manage change

To pass the unit, the student should address the following assessment criteria:

- Evaluate what an effective department/ unit/ service looks like.
- Assess how your own unit contributes to the overall efficacy of the organisation.
- Evaluate the mechanisms that are in place for continuous improvement and development of systems and processes.
- Identify an area for enhancement. Explain the stages required to improve that area. Specific elements might include performance management and objective setting, business process review, system review, and change management techniques. Develop an enhanced approach and explain how this would be implemented and managed.
- Evaluate mechanisms to monitor the success of the new approach.

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this unit, the student should identify an aspect of their department/ unit/ service to enhance, rather than reflect on something that has already happened. The assignment can then be used as the basis for a business case for the change project.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What does effectiveness mean to you? What does it look like in your organisation? What do you understand by continuous improvement? Why is it important?
- How do you monitor the effectiveness of a team, system or process? How is this done within your organisation? What opportunities are there for change? What do you do when something could be improved? What is the attitude to change within your organisation?
- How much – and when – should you involve different people in your process/ system/ team review? What inputs are important? You might find it useful to reflect on a change process you have been part of and how you felt about different approaches. What might effective change management look like?
- What skills might you need to deliver results? Why are these skills important?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading)
- Cohort discussions: Webinar (2 hours guided learning)
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you should attend other Training & Development workshops, including those delivered by ARMA and other organisations. Workshops and other training events count towards your guided learning hours.

Managing collaborations

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

Developing and managing collaborative teams is now the norm within research management. This unit has been designed to help the student gain the skills and understanding they need to support successful collaboration. These might be with similar organisations in their own country or overseas, or they might be partnerships with different types of organisation, such as industry partners. By the end of this unit, the student should demonstrate an understanding of the benefits and challenges of working collaboratively and be able to articulate the core skills required so that they can manage a collaboration effectively.

Learning outcomes:

- To understand the benefits of collaborative projects
- To understand the challenges and risks of collaborative projects
- To understand the skills required to manage collaborative projects successfully

To pass the unit, the student should address the following assessment criteria:

- Explain the benefits of developing collaborative projects and the role they play within your organisation
- Analyse the key factors that might have an effect on the success of a collaborative project
- Describe what a successful collaborative project looks like
- Evaluate the risks involved with collaborative projects and explain your approach to managing them
- Analyse the key skills required for a successful collaborative project, including communication and interpersonal skills. Evaluate the level of those skills within your organisation, identify gaps and make recommendations to fill those gaps.

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this unit, the student should choose an example of a collaborative project – such as with international or industry partners – and use that as a basis for their assignment. The student can use the assignment to identify new opportunities and as the basis for a business case.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If

you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- Why are collaborative projects important? How is your organisation getting involved in collaborative projects? How are they evaluated, in terms of fit within the broader strategy?
- What might you need to look at to assess the risks of engaging in a collaborative project? You might want to consider issues such as the different regulatory, legal and policy frameworks associated with the potential partners. What due diligence would you carry out, and how?
- What skills do you need to manage and deliver a collaborative project? Are these different from other activities you're involved in? What skills do you need to develop, in yourself, in your team and in your organisation?
- What other barriers might there be to effective collaborations?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading)
- Cohort discussions: Webinar (2 hours guided learning)
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you should attend other Training & Development workshops, including those delivered by ARMA and other organisations. Workshops and other training events count towards your guided learning hours.

Data for Decision Making

RQF level: 5

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

Evidence-based decision making is crucial in any organisation. This unit has been designed to help students develop knowledge and skills in working with data to provide useful management information. The unit will explore the different types of data in the research environment, how that data can be analysed, and how it can be used to evaluate and monitor performance, as well as inform decision making. By the end of this unit, students should be able to demonstrate a clear understanding of the role of data in the research environment and how to use that data in different ways.

Learning outcomes:

- To understand the different types and sources of data in the research environment
- To understand how data can be used for different purposes
- To be able to analyse and present data for different audiences

To pass the unit, the student should address the following assessment criteria:

- Explain the different types of data that can be put to use in the research environment
- Describe how your organisation collects data and evaluate the effectiveness of these methods
- Determine what constitutes good quality data
- Understand how data relates to research strategy and policy
- Determine what controls are required to ensure good quality data is produced
- Analyse a chosen data set and determine how it should be used to inform decision making or to evaluate performance
- Interpret the data set for a chosen audience

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this unit, students should focus on a defined data set that is relevant to their role within their organisation. This data set should be used as a consistent example throughout the assignment.**

The assignment can be in one or more of the following: written essay; briefing paper; article; information pack; detailed notes; written plan; written report; presentation plus supporting notes; or recorded presentation. Your assignment should be the equivalent of **2,500 words**. If you have chosen to submit a set of materials (for example, detailed notes, plan and briefing paper), please include a coversheet outlining how each one addresses the assessment criteria.

Questions to consider:

When preparing your assignments, you might find it useful to discuss some questions with your mentor, fellow CRM Advanced students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- Why is data so important? How is data used in your organisation? Are there gaps that present opportunities for enhanced use of data? You might want to think about broader issues in the research sector, such as the growing mistrust of experts in the political sphere.
- Can data be 'good' or 'bad'? What questions should you ask when analysing the value of a data set? Think about your role and responsibilities when creating management information.
- What challenges are there when collecting data? Is all data collection useful? Can you ever collect too much data?
- How can you make data more accessible to different audiences? How creative are you when you put management information together? Where could you look for new ideas about presentation and report writing?

Learning resources:

- Introduction to the unit (recorded presentation)
- Link to online resources (links to relevant websites for initial reading).
- Cohort discussions: F2F event (6 hours guided learning) and webinar (2 hours guided learning). *Participation depends on pathway.*
- Online cohort discussions (via web forum)
- Discussion with your mentor (2 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops, including those delivered by ARMA and other organisations. ARMA workshops on **Responsible Metrics** and **Research Data Management** would be relevant to this unit, each counting as 6 learning hours. Other workshops and other training events will also count towards your guided learning hours.