

Certificate in Research Management: Foundation

The Certificate in Research Management: Foundation has been designed as an introduction to the research management profession. It covers the broad range of topics required for an entry-level understanding of research management, whether that be in universities, funding organisations or other research organisations. Students are likely to be in an early stage of their professional development; either they have just started in their career, or they have moved from a very different work environment, with limited specialist knowledge about research management. It is suitable for members of ARMA and our sister associations.

By completing the Foundation Certificate, students will:

- Develop a broad understanding of the research management environment in their country
- Develop skills and knowledge that can be put to use within their teams and organisations
- Identify the skills and knowledge needed to move to the next stage of their career
- Build a network of peers from across the sector

The Foundation consists of five mandatory modules (outlined in more detail below):

- **Understanding research policy:** designed to help students learn about the different policies and strategies driving research in their country.
- **Understanding research funding:** designed to help students learn about how to effectively cost research projects or portfolios.
- **Research project and portfolio management:** designed to help the student understand the different elements of a research project or portfolio.
- **Supporting research culture:** designed to help the student understand one of two different aspects of the research environment: governance, ethics and integrity; or researcher development.
- **Research impact and public engagement:** designed to help students develop an understanding of research impact and public engagement.

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 five units to complete the Certificate. The Foundation Certificate can be completed in as little as six months, although students can take up to two years if needed.

The Foundation Certificate is a self-guided course. 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 or 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: Foundation is recognised by the ATHE and regulated by Ofqual. It has been assessed as level three of the UK Regulated Qualifications Framework. This means it meets nationally-recognised quality guidelines and offers a qualification equivalent to an English A-Level.

CRM: Foundation Units

Understanding research policy

RQF level: 3

Credit value: 6

Guided learning hours: 12

Total indicative learning hours: 60

Unit aims:

This introductory unit is designed to help students learn about the different policies and strategies driving research in their country. These policies may be government initiatives, such as those in the UK enacted through UKRI, or they might be international, such as European frameworks. They will relate to different aspects of the research environment, including regulatory frameworks, quality measures, research funding, and more. By the end of the unit, the student should be able to demonstrate a broad understanding of different factors impacting the research activities within their own organisations.

Learning outcomes:

- To understand the broad research policy for a named country
- To assess the implications of that policy for their organisation or institution.
- To understand how to identify and disseminate information relevant to their organisation or institution.

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

- Explain the key research policies for their chosen country
- Explain the funding models available for research and the differences between them
- Describe how to keep up to date with changes in research policy
- Assess the impact of research policy on their organisation
- Explain how to identify information relevant to their organisation, such as mapping research expertise
- Describe how they would go about communicating that information

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. This 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 **3,000 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 Foundation students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What the most useful places to look to find out about research policy in your named country? For the UK, you will need to think about UK government and other bodies, as well as the international research policy environment, such as the EU.
- What are the best ways to stay up to date with the research policy environment? Do you always need to go to the original sources (such as the UK government department websites) or are there other ways to get updates?
- How would you start to understand what is relevant for your organisation? Think about organisational strategic objectives, research strengths and research income. How can you apply what you know from the external environment to your organisation?
- What are the best ways to communicate the relevant information to colleagues across your organisation? You might want to think about the different groups of people you are communicating the information to, how they access that information, the level of detail they require, and the frequency of updates. Put yourselves in their shoes!

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 (4 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops or conferences, including those offered by ARMA and other organisations. The **ARMA Induction** training & development workshop and would count as 6 hours towards your learning requirements.

Understanding research funding

RQF level: 3

Credit value: 6

Guided learning hours: 20

Total indicative learning hours: 60

Unit aims:

A crucial element of the policy environment is funding for research projects. This unit is designed to help students learn about how to effectively cost research projects and understand the relation of the price versus the cost of research. Different funders will have different guidelines, and professionals working within research management should have a good understanding of how to apply these guidelines in relation to the cost of research. By the end of this unit, the student should be able to demonstrate a good understanding of how to cost a funding proposal, as well as how to support colleagues in the process.

Learning outcomes:

- To understand the different strategies that can be used to cost funding
- To be able to prepare costing for a funding proposal
- To understand the importance of cost recovery for research
- To understand how to support colleagues in the costing process

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

- Explain the strategies used by their organisation to cost funding
- Assess the strengths and weakness of the strategies
- Assess the impact of internal and external factors on project costs
- Explain how a research costing is put together
- Explain the importance of cost recovery and its impact on research sustainability
Describe the different levels and types of support required for costing in your organisation
- Explain how a research administrator in your organisation would provide the right advice and support

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. This 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 **3,000 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 Foundation students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- How can you find out about different costing strategies? Are these documented within your organisation, guided by external requirements, or both? If there are different options available, how would you assess their strengths and weaknesses? What might impact the choice you make?
- What are the best ways to prepare a research costing? What information might you need to gather before you start? Who has this information? What should you do if information is missing?
- Why is cost recovery important for research? Are there particular challenges for your organisation?
- What support might you need to provide to help colleagues understand the costing process? What skills do you need to provide this support? What are the implications to the research project or portfolio if you fail to provide this support?

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 (4 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops or conferences, including those offered by ARMA and other organisations. The **ARMA Induction** training & development workshop and would count as 6 hours towards your learning requirements.

Research project and portfolio support

RQF level: 3

Credit value: 6

Guided learning hours: 20

Total indicative learning hours: 60

Unit aims:

This unit has been designed to help the student understand the different elements of a research project or research portfolio. The unit covers: supporting colleagues to develop a business case, research proposal or project portfolio; contractual issues; supporting the management of project/ portfolio resources, both financial and staff; managing risk; and reporting outcomes. By the end of the unit, the student should be able to demonstrate a good understanding of these different elements of project and/ or portfolio management. In addition, they should have built new skills to be able to support a research project or portfolio.

Learning outcomes:

- To understand the key features of a business case, research project and/ or research portfolio
- To understand their role in supporting the different elements of a research project/ portfolio, including contracts, financial management, HR, risk management, audit, and reporting.
- To be able to provide support for colleagues at different stages of the process.

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

- Explain the key features of a business case, research project and research portfolio
- Describe their role in supporting colleagues to develop a business case, research project and portfolio
- Explain the contractual issues that might affect a research project or portfolio
- Explain the key factors related to managing project/ portfolio resources, including monitoring spend
- Explain the relevant regulatory and organisational policies related to human resources
- Explain different approaches to manage project/ portfolio risk
- Explain the role of audit within a project/ portfolio
- Describe how to report project/ portfolio outcomes to different audiences

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. This 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 **3,000 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 Foundation students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What is project management? What is portfolio management? What are the different roles in a project/ portfolio team, and what role(s) might you be expected to play? How can you prepare yourself to fulfil those roles? What new skills might you need to develop?
- What technical skills and knowledge are required to successfully support a project or portfolio? You might want to think about the different professional services areas within your organisation. What skills might you need to be able to interact with these different roles, in order to build your own knowledge or find contributors to your project/ portfolio?
- What support do you think different colleagues might need? How might this differ from the support you provide in other aspects 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 (4 hours guided learning)

Training & Development options:

As well as the above resources, you can attend other Training & Development workshops or conferences, including those offered by ARMA and other organisations. ARMA training and development workshop on **Induction, Post-Award Finance** and **Research Contracts** are relevant to this unit and would count towards your learning requirements.

Supporting research culture

RQF level: 3

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

This unit has been designed to help the student understand one of two crucial aspects of the research environment: governance, ethics and integrity; or researcher development, at all stages of a research career. Supporting these aspects within an organisation is crucial for ensuring a vibrant and dynamic research environment that operates with integrity. By the end of the unit, the student will be able to demonstrate an understanding of how good governance or researcher development contribute to a healthy research culture.

Learning outcomes:

1. To understand what a healthy research culture looks like within your organisation.
2. **A.** To understand the relevant the legal, regulatory and other requirements surrounding research ethics, integrity and governance **OR**
B. To understand the importance of researcher development, at all stages of the research career
3. To understand their own role in relation to supporting a healthy research culture.

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

- Outline what a healthy research culture looks like
- **Either:** Explain the purpose of legal, regulatory and other requirements for research ethics, integrity and governance and the main policy frameworks in your country. Then, describe the internal policies and processes to support and monitor adherence to legal and regulatory requirements in your organisation.
- **Or:** Explain the purpose of researcher development and the external drivers guiding researcher development in your country. Then, describe your organisation's internal policies and processes that support and monitor researcher development.
- Describe how your organisation supports and promotes a healthy research culture, and what your role is.

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. **For this assignment, you can focus on either research governance, ethics and integrity or researcher development, depending on what is most relevant to your role. You can also refer to both elements, in relation to a healthy research culture.** This 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 **1,500 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 Foundation students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- What might a healthy research culture look like? Why is this important? What are the implications of an 'unhealthy' research culture?
- Why is research integrity important? What are the implications of not ensuring the integrity of research? You might want to look at specific examples to help you think through the implications.
- What are the most important ways to support researcher development? Why is researcher development important? What happens when you don't support researcher development? You should think across all stages of a research career, starting from postgraduate research students.
- What role do you play in relation to research integrity and/or researcher development? Should you be playing more or less of a role? How do you see these roles developing?

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 or conferences, including those offered by ARMA and other organisations. ARMA training and development workshop on **Induction, Introduction to Research Ethics** and **Supporting Postgraduate Research Students** are relevant to this unit and would count towards your learning requirements.

Research impact and public engagement

RQF level: 3

Credit value: 3

Guided learning hours: 10

Total indicative learning hours: 30

Unit aims:

Research impact and public engagement has become a core feature of the research environment. This unit has been designed to help students develop an understanding of what research impact is, how impact differs from research outputs, how to engage the public with research, and how they can support researchers and organisations to enhance their efforts. By the end of the unit, students should be able to demonstrate an understanding of the importance of research impact and public engagement and to describe how their own organisation has responded to the external drivers.

Learning outcomes:

1. To understand the difference between research impact, research outputs, and public engagement
2. To understand how to communicate research outputs to different audiences
3. To understand the implications of not developing research impact and public engagement

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

- Explain what 'research impact', 'research outputs' and 'public engagement' mean
- Describe different types of research impact and public engagement
- Explain why both research impact and public engagement are important for their organisation
- Outline different ways to evidence research impact and public engagement
- Describe relevant legal, regulatory and organisational statutes, policies and processes that relate to the management of data on research outputs, such as Open Access
- Understand their role in relation to research impact and public engagement

Assessment details:

Students are asked to produce an assignment that addresses the learning outcomes and assessment criteria. This 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 **1,500 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 Foundation students, work colleagues, or line manager. For this assignment, you may want to consider the following:

- How can you find out about the different types of research impact and public engagement? Where might you look for information and updates? Think about what is relevant to your organisation, and how you might support colleagues to increase their knowledge and understanding.
- How important are research impact and public engagement in your organisation? Think about whether they feature in your research or organisation strategy. Are there funding opportunities and/or other mechanisms to support and encourage impact and engagement? If not, why not?
- Where can you find out about external policy drivers for research outputs? What are the key considerations? For example, how is Open Access (Open Data, or Open Research) being supported in your organisation?

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 or conferences, including those offered by ARMA and other organisations. ARMA training and development workshop on **Induction, Routes to Impact** and **Introduction to Research Data Management** are relevant to this unit and would count towards your learning requirements.