

Scoping a Project Management Pathway

Task 029

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Existing landscape review

An initial review was undertaken to compile existing resources outside of those offered at individual institution-level, the findings are catalogued in the table below.

There are multiple current programmes & organisations investigating frameworks and developing materials for various career stages and role types, both in the generalist and DRI contexts.

During this review stage, details of a DRI specific project management pathway being developed by the DRIFT project was shared (see table). Other research-specific work is under development within INRPM, Research Professionals Futures and other initiatives. There are clear opportunities and benefits from collaborating, sharing best practice and signposting to these resources rather than seeking to duplicate.

Due to the existing progress of DRI specific programmes, as well as RSE community surveys, investigation into DRI-specific pathways was stopped for this task, to avoid late, less well-informed duplication. There are also open tasks within SHAREing (Task 015 & 016) which focus on wider professional skills which would contribute to and enhance this landscape from a specialist perspective.

Where SHAREing could quickly fill in gaps

Given the timelines of those pieces of work, and the delivery model of SHAREing, there would be a case for running introductory core courses, during 2026. This could have the dual benefit of supporting RSEs with key skills during the project life of SHAREing, while also reaping benefits for the programme itself, as it would support RSEs in successfully applying for and delivering tasks offered across all work packages. Higher level, bespoke material could then be developed or signposted following the outcome of other work.

Certification

Certification was considered, as a potential way to improve attendance and/or support career development evidence. This is valuable and is being considered & implemented by other networks and programmes. However, where existing certified courses were found from other providers, the fee to complete these was comparable to the more internationally recognised project management qualifications, which may limit their appeal, particularly with a wide range of professional development needs competing for limited CPD funding. It would also take longer to review and accredit programmes. Given the timescales for establishing material within SHAREing, as well as other work acknowledged in the table below, early courses could issue a certificate of attendance to allow quick implementation. This would allow for evidence of skills development in a shorter timescale – for those who do not need a formal PM qualification for their role.

Delivery

Given the national nature of the SHAREing programme and target audience, a standalone session would be better for in-person delivery, with online allowing for a series of shorter

Scoping a Project Management Pathway

themed sessions if this were more attractive to attendees, or asynchronous delivery where there are resources to support this to make courses & resources more accessible and allow wider reach.

Shorter session or asynchronous delivery would also allow people to attend specific sessions where they have identified an interest or skills gap rather than needing to attend all sessions. It could also allow for different specialists to be brought in to deliver each session if needed.

Initial content

Drawing on experience of research project management course design & delivery as well as the findings of Barbosa et al (2025)ⁱ and Santos (2025)ⁱⁱ and a review of the PRINCE2ⁱⁱⁱ, PMP^{iv} and APM^v qualifications, an initial shortlist of potential key areas to consider is proposed below. This would cover the basics, pending outcome of the other relevant SHAREing tasks and other DRI programmes. These core components could be tailored for a DRI audience with contextual setting, case studies and examples. It could also be complemented by specialist modules depending on the role of the dRTP and the context of their research.

- Project lifecycle and different PM techniques/systems
- Project planning, proposal writing
- Governance & compliance (roles & responsibilities; legal, institutional & funder context; ethics; project monitoring)
- Resource management (inc finance, personnel, suppliers and facilities etc)
- Risk, issue and change management
- Data management
- Stakeholder engagement, communication & impact planning
- Leadership and collaboration skills
- Reporting, project close and sustainability (inc open access, follow on funding)

Scoping a Project Management Pathway

Source	Summary	Detail	Link
General Research Project Management			
CARDEA Academy Hub	Open Access training platform	Various modules grouped under the following headings <ul style="list-style-type: none"> • Pre Award • Post Award • Managing EDI (Gender, Disability & Racism) • Data Stewardship • Technology Transfer • HR Research • Research Finance • Clinical Research Management • Research Ethics and Integrity • Cognitive Abilities & Transversal Skills • Research Project Oversight & Management • Line Management & Talent Development • Communication • Relationship Management • Community Engagement • HRS4R in Research Management • AI in Research Management 	https://www.cardeahub.eu/
The European Competence Framework for Research Managers	Framework with competencies for 4 career levels cross 7 areas	Under headings: <ul style="list-style-type: none"> • Research Project Oversight • Subject Matter Expertise/Specialised Knowledge • Technical Proficiency • Stakeholder Engagement • Communication • Line Management and Talent Development • Cognitive Abilities/Personal Traits 	https://research-and-innovation.ec.europa.eu/document/download/b2723267-0a7a-4459-88a3-8639b25fceb5_en?filename=ec_rt_d_research-competence-managers-presentation.pdf Competence Framework University College Cork

Scoping a Project Management Pathway

<p>EARMA Academy</p>	<p>Open access training modules Online (paid) certification In-person training (under development) Mentoring</p>	<ul style="list-style-type: none"> • Introduction to Research Management and Administration • Funding Landscape and Proposal Development • Research Ethics & Research Integrity • Open Science and Research Data Management • Communication and Stakeholder Engagement • AI in Research Management and Administration – Fundamentals & Applications 	<p>https://earma.org/EARMA-academy/</p> <p>https://earma.org/earma-academy/online-hub/</p>
<p>RM Roadmap</p>	<p>Training materials, resources & videos (some overlap/links to Cardea, some standalone)</p> <p>Includes link to share your own resources: https://forms.gle/PVuUr1zyZsNmwpNh9</p>	<p>Headings include:</p> <ul style="list-style-type: none"> • Research Grant Pre-Award • Research Project Management (Post Award) – see <i>breakdown below</i> • Finances • Research Impact & Science Communication • Research Infrastructure • Research Data and Information • Research Knowledge and Technology Transfer • Research Policy and Strategy • Researcher Training & Career Development • Research Support Delivery • Research Ethics and Integrity • Research Evaluation & Assessment • Equality, Diversity & Inclusion • Other fields 	<p>https://www.rmroadmap.eu/rm-resource-platform</p> <p>https://www.rmroadmap.eu/</p>
<p>RM Roadmap – pathway highlighted above (example options mid April 2026)</p>	<ul style="list-style-type: none"> • Research Project Management pathway 	<p>Example options</p> <ul style="list-style-type: none"> • Stakeholders • Managing EU Research Grants • Legal Aspects • Ethics • Open Science Requirements • Managing the Research Project 	<p>https://www.rmroadmap.eu/rmrp-research-project-management-post-award</p>

Scoping a Project Management Pathway

		<ul style="list-style-type: none"> • Establishing the Research Project Plan • Managing Project Deliverables, Monitoring & Evaluation • Trust Communication Relationship • Difficulties, Cooperation with Business • Project lifecycle and RMAs as Professionals in the Project lifecycle • PM Structure, Grant Agreement & Consortium Agreement • PM integration, monitoring & Control • Quality & Risk Management • Team Management • PM Terms • Project Planning for Beginners (PM Training) • How to plan an event (PM training) • Top Deliverables in project management • How to write effective Project reports • The Role of the Project Manager • 5 steps to PM Planning • 13 Simple PM tips • Horizon Europe specific modules 	
PATTERN	<p>Open & Responsible Research training activities and resources in 8 transferable skills areas</p> <p>Templates</p>	<ul style="list-style-type: none"> • Open access • Research Integrity • Management and Leadership • FAIR data management • Science Communication • Dissemination and exploitation of results • Citizen Science • Gender, non discrimination and inclusion in research 	<p>https://www.pattern-openresearch.eu/</p> <p>https://pattern.projects.directory/categories/</p> <p>Similar Initiatives - PATTERN</p>

Scoping a Project Management Pathway

INRPM	Community, events, templates and certification	New International Research Project Management network in process of setting up.	https://internationalrpm.org/
Research Professionals Futures	(pending)	Research England funded project to analyse and support research professionals with framework and toolkits.	ARMA will be hosting some of the materials produced Research Professional Futures Project – ARMA
ARMA	Qualifications, training, SIGs, mentorship – paid membership	Association of Research Managers and Administrators. Mostly targeted at research management staff in research office roles and similar (ie development, pre-award, Postaward finance)	https://arma.ac.uk/
PRISM	Community, events, resources. Free. (includes technicians & research project managers amongst other roles)	Project Management training series (3x 45min online sessions May-July 26) Other sessions available via recording or future sessions.	https://www.prismanagers.ac.uk/events
DRI specific			
DIRECT Framework	Framework of skills and competencies		https://directframework.com
DisCOURSE	Flexible fund for dRTP projects (in progress)	Example funded projects: <ul style="list-style-type: none"> • understanding project management tool effectiveness in diverse dRTP contexts (Mar-Jun26) • cohort based open leadership training & mentoring (Jan-May26) 	https://discourse-network.github.io/projects/
DRIFT	DRI training project	Including A Curriculum for Managing Research Software Projects https://doi.org/10.5281/zenodo.17035677	https://drtp-skills.ac.uk/about/drift/
CHARTED	RTP Hub project	Understanding the dRTP training landscape EPCC	https://drtp-skills.ac.uk/about/charted/
UKRI Digital Research Skills Catalyst	Learning portal, consultation service, workshops and events		https://digitalskillscatalyst.ac.uk/

Scoping a Project Management Pathway

SSI resource hub			https://www.software.ac.uk/resource-hub
SocRSE	Community, events, resources	RSE surveys	https://society-rse.org/ RSE Survey Report
MIT OpenCourseWare	Open course and module material	e.g. Project Management System project management Data Management	Full list: https://ocw.mit.edu/search/?q=project%20management
CAKE	Knowledge Exchange	Details of other projects and activities supporting DRI communities	Computational Abilities Knowledge Exchange

General Project Management:

- Paid, formal PM qualifications and professional body membership, for example **PeopleCert, APM, PMI, Agile (APMG, BCS)**
- **APM** (paid) membership on qualification or evidence of experience. Formal paid qualifications, community, resources.
- **P3express** is a minimalist project management system – free manual and online training/ Paid certification [P3.express -- The minimalist project management system](#)

References

ⁱ Barbosa, C., Cebolla Sanahuja, L., Collini, M., Moser, R., R. C. A. Santos, J. M., Twohig, R., & Vare, D. (2025). Research Project Management: Defining Roles and Responsibilities from Practice/Experience. *Journal of Research Management and Administration*,4(1).
<https://doi.org/10.18552/jorma.v4i1.1196>

ⁱⁱ Santos, J. (2025). The Conundrum of Managing Research and Development Projects: How Can Research Managers and Administrators Leverage Industry Practices in Project Management? *Journal of Research Management and Administration*,4 (1), 2025053001.
<https://doi.org/10.18552/jorma.v4i1.1132>

ⁱⁱⁱ PRINCE2: [PRINCE2 Project Management |](#) (PeopleCert)

^{iv} PMP: [Project Management Professional \(PMP\)® Certification | PMI](#) (Project Management Institute)

^v APM: [Project management qualifications & training | PFQ | PMQ | PPQ](#)