



foRMAtion Teaching Material

IO3 foRMAtion teaching material for the international curriculum for RMA's

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Document Control Sheet

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Table 1 – Document Control Sheet

Versioning and Contribution History

| Version | Date | Author/Editor | Contributors | Descripton/Comments |
|---------|------------|--|---|---------------------|
| _v01 | 17/10/2020 | Lídia Vinczéné Fekete Éva Kőváriné Ignáth | Magdolna Daruka Judit Sass Beáta Paragi Judit Fekete | |
| _v02 | 21/01/2021 | Lídia Vinczéné Fekete Éva Kőváriné Ignáth | Andreia Domingues Szenkovics Dezső Zsuzsanna Angyal Borbala Schenk, Borbala Schenk Consultancy | |
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Table 2 – Versioning and Contribution History

Executive Summary

Intellectual Output 3 (IO3) aims to develop the teaching material for the international curriculum for future Research Managers and Administrators (RMAs), which includes various innovative educational tools, to develop students' professional and transversal skills. In line with the outcomes of the transnational meetings and the main findings of the methodological guide and good practice collection (IO1), the curriculum and the teaching material is based on the "learning outcome approach", fostering a student-centred teaching-learning process, and applying several modern and innovative educational tools and methodologies such as Problem Based Learning.

It provides tools and methods for instructors to develop students' most important soft skills that they might need as RMAs such as cooperation, (written and oral) communication, problem solving, flexibility, time management, networking, negotiation etc. The development of these skills and competences is enhanced not only by the application of innovative teaching methods but also by shaping teachers' attitude and views on their role in the learning process and on the goals of the learning process. Several activities aim to enhance the digital skills of the students and their familiarity with working with different applications and online interfaces. The ability to exploit these tools is becoming increasingly important, as they enable a more flexible and more efficient work and they provide the conditions for a smooth collaboration for teams in an online environment. In some cases, such as applying different applications for writing quizzes or brainstorming, involvement of digital tools serves the purpose of making the teaching-learning process more playful for students, thus contributing to increase their engagement. Each lesson includes activities which require the cooperation of students, and the learner-centred approach facilitates interactivity.

IO3 (teaching material for the international curriculum for Research Managers and Administrators) is one of the first three intellectual outputs of the foRMAtion project. Based on the Application Form, the objective of IO3 is to elaborate a teaching material that gives guidance to the instructors attending the teachers training activity within foRMAtion project (C2, Short-term joint staff training event for teachers and professors) and then teaching the curriculum (see IO2). When elaborating the teaching material, a learner-centered, practice-oriented approach was applied. The activities, tasks included in the lessons aim to improve the transferable skills of the participating students.

The primary dissemination target group of IO3 are the teachers, lecturers at the participating universities and beyond.

As indirect target groups, researchers and experts involved in higher education course-design will also benefit from the teaching material, as well as RMAs and students participating in the RMA courses. The students in general at the universities and the university management are also target groups from the point of view of dissemination. The methodology of the teaching material for the international curriculum for future RMAs will be adapted to the special needs of the non-formal adult education, thus adults and adult learning providers are also considered as indirect target groups. RMAs already working on the labour market and coordinating teams can also benefit from IO3 when they provide further training for their staff members.



1. Introduction and methodology

Intellectual Output 3 (IO3) aims to develop the teaching material for the international curriculum for future Research Managers and Administrators (RMAs). The teaching material was elaborated parallel with the IO2 international curriculum, following its modular structure.

Learning outcome approach

The learning outcome approach is a basic principle guiding the elaboration of the teaching material. As a background and starting point for the elaboration of the teaching material, a desk research had been conducted related to the features of the learning outcome approach in HE (guidance to define learning goals and outcomes), and on the identification and formulation of knowledge, skills and attitudes.

Sources such as the European Qualification Framework for Lifelong Learning (EQF, 2008), the homepage of The framework of qualifications for the European Higher Education Area and the Tuning - Educational Structures in Europe (<http://www.unideusto.org/tuningeu/>) give relevant overview of the competence frameworks. Considering the essential EU policy documents and strategies, for the phrasing of learning outcomes, the ECTS (European Credit Transfer and Accumulation System) Guide¹, as well as the Defining, writing and applying learning outcomes: a European handbook (CEDEFOP, 2017) or the Application of learning outcomes approaches across Europe; a comparative study (CEDEFOP, 2016) proved to be the most adequate and fundamental resources. Research encompassed the academic literature discussing teaching methodology, course/curricula and learning outcome development in HE such as the work of Kennedy et al (2007; 2009)² and Bloom taxonomy³.

Reference of existing frameworks and projects:

- [CanMEDS 2015](#): the most widely accepted and applied physician competency framework in the world; [competence framework](#), [learning outcomes with milestones](#)
- [EQF](#) (European Qualification Framework)

¹ https://ec.europa.eu/education/ects/users-guide/docs/ects-users-guide_en.pdf

² Kennedy, Declan & Hyland, Áine & Ryan, Norma.: Writing and Using Learning Outcomes: A Practical Guide. <https://www.cmepius.si/wp-content/uploads/2015/06/A-Learning-Outcomes-Book-D-Kennedy.pdf>, 2007, retrieved: 20 December, 2019; Kennedy, Declan & Hyland, Áine & Ryan, Norma.: Learning Outcomes and Competences. https://supportthere.org/sites/default/files/2_paper_los_and_competences_bologna_handbook.pdf, 2009, retrieved: 15 January, 2020.

³ Bloom's Taxonomy of Measurable Verbs <https://www.utica.edu/academic/Assessment/new/Blooms%20Taxonomy%20-%20Best.pdf>; retrieved: 20 December, 2019.

- [ECTS](#) (The European Credit Transfer and Accumulation System)
- [EHEA](#) (European Higher Education Area)
- [BESTPRAC](#)

Hungarian sources compiled on the base of the above mentioned studies also stimulated productive thinking in connection with the teaching material, for example the handbook edited by Lukács&Derényi⁴, Éva Tót's study⁵ on writing learning outcomes or the manual of Éva Farkas⁶. These sources provided useful information regarding the process of formulating learning outcomes starting with the identification of learning goals, competences, and the way of phrasing relevant learning outcomes (giving hints on active verbs).

Teaching methodology: principles and tools

The main principle guiding the structure of the curriculum and the teaching material is the constructivist interpretation of teaching-learning process, characterized by

- a student centred approach,
- focusing on the *process* and the *outcome*, not on the *input*
- its main goal, namely the development of the necessary *competences*, while the disciplinary *content* is just a tool to achieve this goal.

Main tools: gamification, innovative, various, technology enhanced, interactive tools and methods such as Problem Based Learning (PBL). Flexible learning opportunity and continuous feedback from the teacher are promoted by blended learning and the advanced use of technology.

Taking into account the conclusions of the second transnational meeting (TM2) and the joint staff training event (C1) in Porto and those of IO1, exploring the academic literature on **Problem Based Learning** was carried out. The application of this **student-centered approach** in the modules of the projects could be convenient, since it “empowers learners to conduct research, integrate theory and practice, and apply knowledge and skills to develop a viable solution to a defined

⁴ Kézikönyv a képzési programok tanulási eredményeken alapuló fejlesztéséhez, felülvizsgálatához. István Lukács & András Derényi (eds.) Oktatási Hivatal, Budapest, 2017

⁵ Éva Tót: Segédlet a tanulási eredmények írásához a felsőoktatási szektor számára. Oktatási Hivatal, Budapest, 2017

⁶ Éva Farkas: Segédlet a tanulási eredmények írásához a szakképzési és felnőttképzési szektor számára. Oktatási Hivatal, Budapest, 2017

problem”⁷. Savery also mentioned several benefits of the PBL approach. The Wiley Handbook of Problem-Based Learning also offers a detailed overview of the approach, namely, (i) origin of the concept and its baseline, (ii) case studies, (iii) proposal of strategies to design PBL and also provides some examples of its application.⁸

The application of the approach in the classroom (examples) is mentioned in the booklet series called “Módszertani füzetek” (Series of Methodological Booklet). The first in the series⁹ includes the general methodology, touching upon constructive learning theory and cooperative learning methods, within which PBL is also introduced.

The handbooks of Biggs et al. (2007)¹⁰ and of Fry, Ketteridge and Marshall (2008)¹¹ provide valuable and useful guidelines regarding the methodology of HE instruction.

Practical cooperative learning techniques (such as expert jigsaw) are described in Spencer Kagan’s book on cooperative learning¹², and some possible applications are mentioned in the Methodological Booklets. In addition to the aforementioned resources, a number of websites make available up-to-date, innovative and practical information on HE teaching methodology, such as www.teachthought.com, tanarblog.hu, [The Chronicle of Higher Education](http://TheChronicleofHigherEducation.com). The websites of the educational centres of the most prestigious universities like [Teaching and Learning Lab](http://TeachingandLearningLab.org) of the Massachusetts Institute of Technology, [Vice Provost for Teaching and Learning](http://ViceProvostforTeachingandLearning.org) at Stanford

⁷ Savery, J. R.: Overview of Problem-based Learning: Definitions and Distinctions.

Interdisciplinary Journal of Problem-Based Learning, 1(1), 2006

⁸ Moallem, Mahnaz, Woei Hung, and Nada Dabbagh: The Wiley Handbook of problem-based learning. Wiley Blackwell, NJ, USA, 2019. Examples for other sources on PBL: Gijbels, D., Dochy, F., Van den Bossche, P., & Segers, M: Effects of Problem-Based Learning: A Meta-Analysis From the Angle of Assessment. Review of Educational Research, 75(1), 2005; Baviera-Puig, A., Buitrago-Vera, J., Escribá-Pérez, C., Pons-Valverde, JV.: An Example of Problem-Based Learning (Pbl) from a Collaborative and Multidisciplinary Approach. Conference: International Conference on Education and New Learning Technologies, June 2016; Journal of Problem-Based Learning.

⁹ Daruka, M., Pfister, É.: Módszertani Füzet I. Általános módszertan tanár szakos hallgatóknak. CC PRinting Kft., Budapest, 2015.

¹⁰ Biggs, J. B., Tang, C.: Teaching for quality learning at university. Open University Press/Mcgraw-Hill Education, Berkshire, UK, 2007

¹¹ A handbook for teaching and learning in higher education : enhancing academic practice / [edited by] Heather Fry, Steve Ketteridge, Stephanie Marshall, 2008

¹² Kagan, S., Kagan, M.: Kagan Cooperative Learning. Kagan Publishing, Canada, 2009



University, [Derek Bok Center for Teaching and Learning](#) at Harvard University among others offer insight into the innovative teaching practice of these institutions.



2. General annexes: practical information and guides

Annex 1: Guide for Mentimeter quiz

1. Go to <https://www.mentimeter.com/signup>
2. Sign up for your own Mentimeter account
3. Create and name a new presentation
4. Select the “Quiz Competition”, and then “Select answer” options from the “Types” menu shown in the box on the right
5. Following this, the “Content” menu appears automatically.
6. Fill in your question and enter right and false answer options
7. Set the time for the answer (usually, 10-20 seconds are enough)
8. If you would like to show the leaderboard to students (it is recommended), click the next slide and Add a new slide.
9. You can change the background and style of the slides by using “Themes” settings in the top-right menu bar
10. Students can access your Mentimeter if you select the “Share” option and shoes “Participation” in the appearing window. Here you can select the preferred way of participation: link, QR code or voting code (the latter is the most used option by teachers)
11. Tutorial and detailed description: <https://help.mentimeter.com/en/articles/410459-multiple-choice-questions>

Annex B: Jigsaw method

How to apply the jigsaw method in the classroom?

1. Students form groups and number themselves 1, 2, 3, 4, 5 [with 5 as the optimum number in the group]. (Determine the size of these groups according to how many students will profitably work together at the end of the exercise.)
2. All the 1s join together, all the 2s, and the 3s etc to create new ('expert') groups.
3. Each group has a different aspect of a topic in which to become an expert. The 'expert' group researches a topic (the topic can be studied first individually and then can be discussed together within them).
4. 1s, 2s, and 3s then return to their original group and present their new knowledge in the form of a mini-presentation.
6. Where possible, get the students to present their new knowledge with their own words but using the main professional terms.

Source: <https://www.cultofpedagogy.com/>

Video tutorial: <https://www.youtube.com/watch?v=VXxN99Le0nc>

How to apply the jigsaw method in the online learning environment?

- Step 1: Break lesson/topic into segments_and upload them (either in different documents or within one) on the commonly used online learning platform
- Step 2 Divide students in groups_(in Zoom: chat rooms, in Teams: sub-channels)
- Step 3: Give students time to read over assigned materials_individually
- Step 4: Form temporary expert groups_(using new "expert" chat-rooms/sub-channels). They can discuss their findings and they can also compile a common online document saved in their sub-channel or other online learning platform)
- Step 5 : Bring 'experts' back to their home group_where each group member can present the information learned.
- Step 6: Students can be required to assess each other's presentation. The teacher wraps up the lesson, summarizing the main information by using the "questioning method" (helping structuring and comprehension of the content by activating students' existing understanding).

Video tutorial: <https://www.youtube.com/watch?v=-ULJfgkZVMY>

Annex C: Guide for teachers for the application of Google Forms for classroom activities

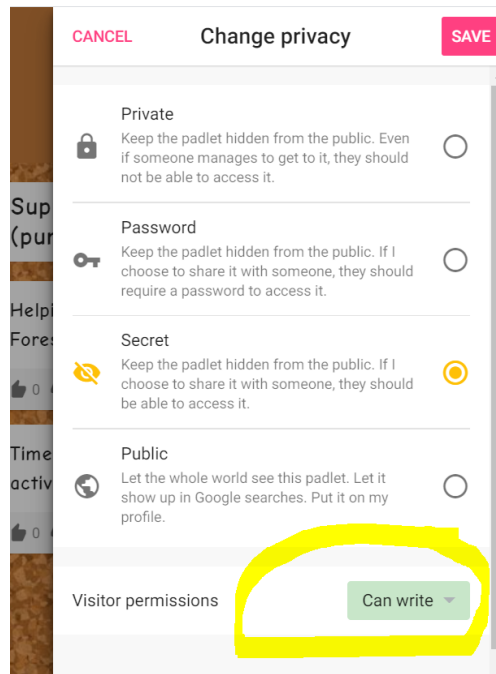
1. Go to <https://docs.google.com/forms/u/0/>
2. Sign in with your Google account
3. Start a new form
4. Insert your questions in the form
5. It is usually worth starting the questionnaire with the indication of the student's name (enabling identification of the answers)
6. If you would like to assess student's individual performance, uncheck the "Edit after submit" option in the "Settings".
7. If (and when) you would like to discuss the results with the whole class, you can check the "See summary charts and text responses" option.
8. You can set the layout of your Form using the "Customize theme" menu (top right corner)
9. How to present the result for students?
 1. Select the "Responses" page of your Google Form;
 2. choose the "Create Spreadsheet" option (top right corner, grid icon);
 3. the spreadsheet is more transparent if you select the entire spreadsheet and then format it with the "text wrapping" command available in the upper menu bar of the spreadsheet (see the icon below)



- d. When presenting and projecting the table, it is recommended to hide the columns including timestamp and students' names.

Annex D: How to use Padlet as an online classroom whiteboard?

3. Go to <https://padlet.com/> and sign up
4. On the upper menu bar, select *Make a padlet* command
5. Select a template, e. g. “Shelf” if you would like students to fill in a table together
6. Customize your layout using the *Settings* (upper right corner of the screen)
7. Create columns and give them the names of the categories
8. Share your padlet with your students
9. Select Share (upper right corner of the screen)
 - a. In the appearing window, choose “change privacy” so that visitors can edit the dashboard
 - b. You can share your padlet by clicking *Copy link to clipboard*



10. Students can add items to the columns by clicking the + sign on the screen

Video tutorials:

<https://www.youtube.com/watch?v=UkBnwPgaljA>

<https://www.youtube.com/watch?v=uBvWCWuuFFM>

2. Teaching material for the international curriculum for Research Managers and Administrators

Module 1 Research Methodology and Design

Lesson 1: Introduction to science - what distinguishes scientific knowledge from other types of knowledge

Learning outcomes to be developed:

- The student can distinguish and describe the different approaches in scientific theories and epistemological trends, and their scientific history-background (hermeneutical vs scientific, inductive vs. deductive, qualitative vs. quantitative approach, mixed-methods)
- The student is open to perceive and accept the diversity of cultural and social context of research systems and practice
- The student is open for different research methods and is committed to finding consensus in an interdisciplinary research setting

Legend for the use of lesson plans: Grey texts describe useful but optional activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|--|---------------|
| a) Games helping students to be connected: getting acquainted with each other <i>15 minutes</i> <ul style="list-style-type: none"> ● Share a personal fact about yourself and then find something in another student's report to which you can connect in some way. E. g. <ul style="list-style-type: none"> ○ the teacher starts the game by sharing "I like listening to classical music", | | 15 mins |

| | | |
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| <ul style="list-style-type: none"> ○ the first student says “I have 2 younger brothers and one of them plays the piano” and “My hobby is travelling” - etc. ● “Show and tell” see here ● OR: “Snowball fight”- see here ● OR: Haiku writing with instructions (Instructions for the poem: first line: the title of the poem (the topic itself, according to the expectations of the students, for example: the RMA profession/research projects; second line: describe the topic with two adjectives; third line: three verbs (expressing action) in connection with the topic; the fourth line: a short sentence that expresses feeling about the topic; the fifth line: one-word synonym of the first line that reflects the essence of the topic. ● OR see further ideas here ● A brief introduction, summary of the modules | | |
| <p>b) Evaluation of prior knowledge and competences - 10 minutes Exploring the initial competences, knowledge of students: Answers to basic questions by either of the followings</p> <ul style="list-style-type: none"> ● Kahoot test (after registering, at Kahoot homepage, you can create games helping assessment here (https://create.kahoot.it/creator). Students shall visit kahoot.it page, where they can type in the game pin and then their name. ● Closed by teacher’s feedback and oral summary | <p>(Results (scores) should not be counted into the end of semester grade)</p> | <p>10 min</p> |
| <p>c) Activities helping the understanding of theoretical foundations - 35 minutes For the content and exercises, see Annex 1.1. A and 1. 1. B and the literature below this table</p> <ul style="list-style-type: none"> ● Jigsaw method (A guide for the teacher on the application of jigsaw method is available in Annex B): Topics to be included (and according to the teacher’s preference, can be changed: <ul style="list-style-type: none"> ○ IO2 on induction and deduction ○ the terms ontology, epistemology, theory (See the references below this table) | | |

| | | |
|--|---|---|
| <ul style="list-style-type: none"> Depending on the number of students, (in the case of a 16 students-class) 4 readings (each of them can be 3-5 pages long) discussing the main theoretical units/part-topics (e. g. scientific theories, epistemological trends and their scientific history background), these are distributed to the 4 teams who read, discuss and present them. OR YouTube videos like https://www.youtube.com/watch?v=8xvpxBVCo0c The assignment of the groups: they discuss and summarize the main conclusions of their readings in the form of a commonly edited outline in an online document, shared with the teacher (e. g. Google Document) Students go back to their original groups (see the Annex B - Jigsaw guide) and present the content discussed in the expert groups for their own group. The group members can give the presenter 1-10 points, considering the clarity and attractiveness of their presentation. The class creates an online, e. g. Coggle (https://coggle.it/) mindmap with the direction of the teacher, based on the outlines created by the groups with the facilitation of the teacher. See an example in Annex 1. 1. B. | <p>max. 5 points/person for the outlines</p> <p>The teacher divides the total score given by the classmates to each presenter by 10</p> | <p>5 min for individual reading</p> <p>10 min for group discussion and outline</p> <p>10 min for presentations (2,5 minutes/presentation)</p> |
| <p>d) Activity providing insight into the RMA and researcher professions - (20 minutes)</p> <ul style="list-style-type: none"> Introduction to the RMA carrier by inviting an RMA (10 minutes of self-introduction + 10 minutes of Q&A) Questions of the teacher previously sent to the RMA as a guide for the presentation, for example <ul style="list-style-type: none"> Your education background. What kind of education is useful in the case of an RMA? How did you choose this profession? What are your duties? What are the most exciting or challenging parts of the profession? What do you love in your job? What are the trajectories of further development / career opportunities? | | <p>20 minutes</p> |

| | | |
|---|--|--------|
| <ul style="list-style-type: none"> ○ <i>What are the most important / useful skills for this profession?</i> ● optionally, this conversation can be done via Internet as well <p>e) Quick end-of-lesson feedback for the teacher Quiz questions by Socrative or Wordwall game with quiz questions related to the content of the lesson.</p> | | 5 mins |
|---|--|--------|

References for this lesson:

- Babbie, E. R. (2016). The practice of social research. Available in our Files/Readings folder of the General channel of our Teams group.
- Lewis-Beck, M. S., Bryman, A., & Futing Liao, T. (2004). The SAGE encyclopedia of social science research methods(Vols. 1-0). <https://methods.sagepub.com/Reference/the-sage-encyclopedia-of-social-science-research-methods>
- Sage Project Planner tool <https://methods.sagepub.com/project-planner>
- Szokolszky, Ágnes (2004) Kutatómunka a pszichológiában. Metodológia, módszerek, gyakorlat. Budapest: Osiris

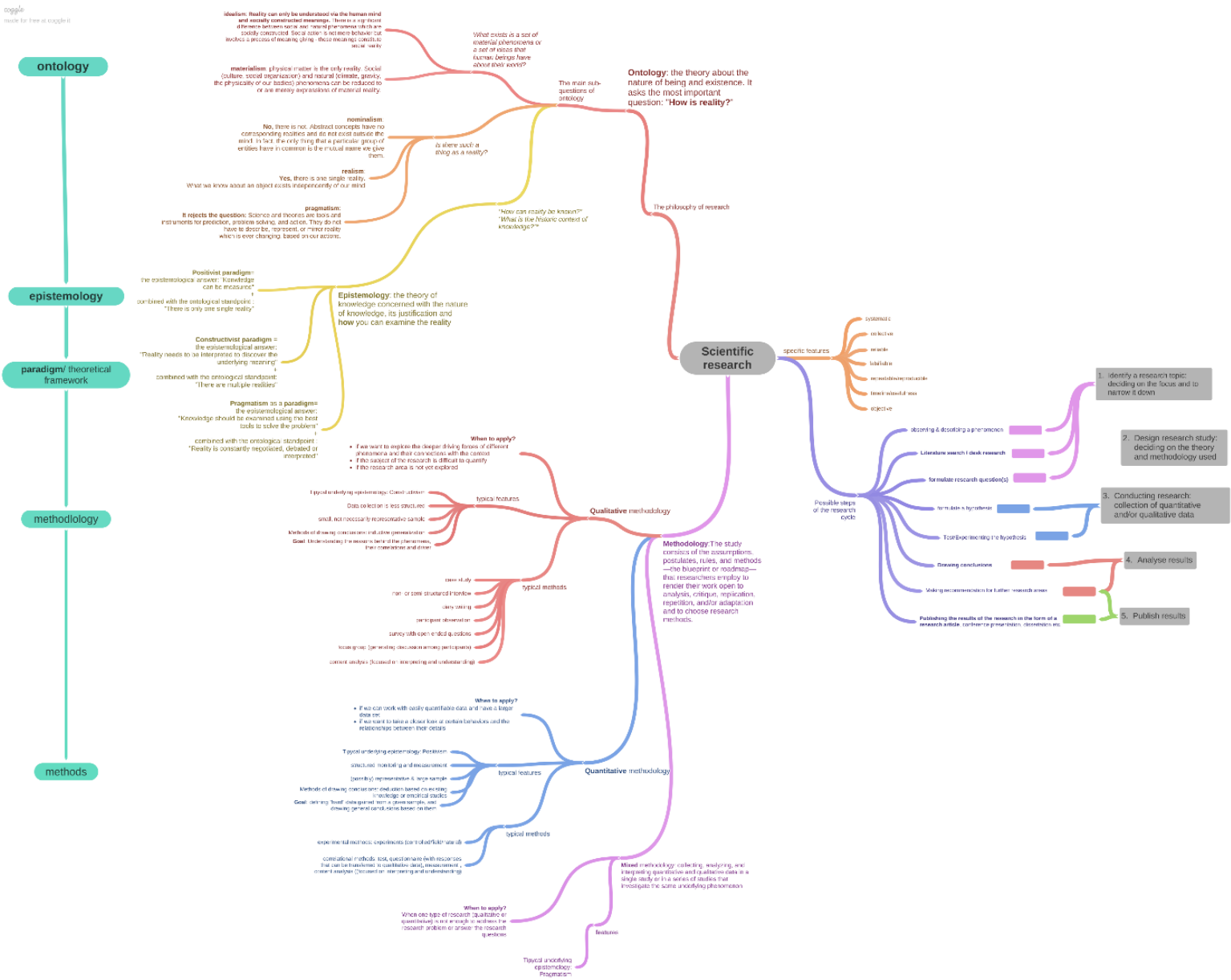
Annex 1. 1. A – Summary table of concepts and methods

Source: <http://salmapatel.co.uk/academia/the-research-paradigm-methodology-epistemology-and-ontology-explained-in-simple-language/>

| Paradigm | Ontology <i>What is reality?</i> | Epistemology <i>How can I know reality?</i> | Theoretical Perspective <i>Which approach do you use to know something?</i> | Methodology <i>How do you go about finding out?</i> | Method <i>What techniques do you use to find out?</i> |
|--------------------------------------|--|---|--|---|--|
| Positivism | There is a single reality or truth (more realist). | Reality can be measured and hence the focus is on reliable and valid tools to obtain that. | Positivism Post-positivism | Experimental research Survey research | Usually quantitative, could include: Sampling Measurement and scaling Statistical analysis Questionnaire Focus group Interview |
| Constructivist / Interpretive | There is no single reality or truth. Reality is created by individuals in groups (less realist). | Therefore, reality needs to be interpreted. It is used to discover the underlying meaning of events and activities. | Interpretivism (reality needs to be interpreted) <ul style="list-style-type: none"> • Phenomenology • Symbolic interactionism • Hermeneutics Critical Inquiry Feminism | Ethnography Grounded Theory Phenomenological research Heuristic inquiry Action Research Discourse Analysis Feminist Standpoint research etc | Usually qualitative, could include: Qualitative interview Observation Participant Non participant Case study Life history Narrative Theme identification etc |
| Pragmatism | Reality is constantly renegotiated, debated, interpreted in light of its usefulness in new unpredictable situations. | The best method is one that solves problems. Finding out is the means, change is the underlying aim. | Deweyan pragmatism <i>Research through design</i> | Mixed methods Design-based research Action research | Combination of any of the above and more, such as data mining expert review, usability testing, physical prototype |
| Subjectivism | Reality is what we perceive to be real | All knowledge is purely a matter of perspective. | Postmodernism Structuralism Post-structuralism | Discourse theory Archaeology Genealogy Deconstruction etc. | Autoethnography Semiotics Literary analysis Pastiche Intertextuality etc. |
| Critical | Realities are socially constructed entities that are under constant internal influence. | Reality and knowledge is both socially constructed and influenced by power relations from within society | Marxism Queer theory feminism | critical discourse analysis, critical ethnography action research ideology critique | Ideological review Civil actions open-ended interviews, focus groups, open-ended questionnaires, open-ended observations, and journals. |

Annex 1. 1. B – A summary for main research related terms

- the Coogle mind map is available online at <https://coggle.it/diagram/YCOvki31dzsfuK4c/t/scientific-research/ff072fa65164da7d1e87cee64918a1bb9a207483de86c69da060a0f4936faeee>, it can be copied and further edited by users
- the png format file is available here: https://www.dropbox.com/s/yvi0uat8n4af9hp/Annex_1.1.B_Scientific_research.png?dl=0



Lesson 2: Introduction to research design, research methods and research life cycle

Learning outcomes to be developed:

- The student can distinguish and describe the types and specificities (aims, advantages, limits, appropriateness to certain disciplines) of main research methods that can be applied by different scientific areas (e.g. observation, survey, interview, focus group, experiments, etc).
- The student should understand the research project lifecycle.
- The student can identify the differences between a research design/plan and a research proposal.
- The student can apply the stages of the research project lifecycle to a research plan, identifying the key questions to answer at each stage.
- The student is able to recognise and integrate the motivations, expectations and role of a researcher.
- The student is able to construct logical arguments to present a research idea.
- The student is committed to find a balance between assertiveness and cooperation in the course of teamwork in research as a leader and as team member.
- The student is open to perceive and accept the diversity of cultural and social context of research systems and practices.
- The student is open for different research methods and is committed to finding consensus in an interdisciplinary research setting.

Legend for the use of lesson plans: Grey texts describe useful but optional activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|---|--|---------------|
| a) Playful activity enhancing recalling prior knowledge: - 5 minutes | | 5 mins |

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| <p>Wordcloud (https://www.mentimeter.com/): “Answer the following question by typing single words at this link, indicating the following code:”</p> <p><i>Content of the questions will be related to the curriculum, e. g. What are the goals/main features/of science? What are the distinctive features of natural science/human and social research?etc. They can refer to the following terms and concepts: science, inductive and deductive inference, experiments, observation</i></p> <p>b) 10 minutes long frontal presentation by the teacher:</p> <ul style="list-style-type: none"> • goal: providing short summary of the first lesson, laying the foundations for research methods, brief explanation of theoretical framework, the main terms such as <ol style="list-style-type: none"> 1. research question 2. hypothesis 3. literature review 4. qualitative data 5. quantitative data 6. Survey Research 7. Discourse analysis 8. Mixed-methods 9. experimental method <p>c) Activities helping the understanding of theoretical knowledge</p> <ul style="list-style-type: none"> ○ Online option with Padlet (advantage: the result can be downloaded and saved as a graph). See a guide for the use of Padlet in Annex D but now please select the “Canvas” template ○ The name of each concept is distributed among pairs of students ○ they have to work together on Padlet (https://padlet.com/) ○ A sample Padlet board is already elaborated for this task, see this link: https://padlet.com/vinczelidia/xrwpcamo84926xwz | <p>Peer grading (giving points to each other) as the group members work together. Providing the correct specificities of the research methods. Suggestion for grading: 10 points maximum for the infographic (the group members receive the same amount of points)</p> <p>-----</p> | <p>10 mins</p> <p>35 mins</p> |
|---|---|-------------------------------|

- Teachers are asked to not use this one, but sign in and then choose the “Remake” option thus using the copy in their lesson.
- Pairs of students have to find
 - the (green) card showing examples for the different concepts/terms
 - and the yellow cards presenting the definition of the given term.
- They have to drag and drop their term, its definition and the example close to each other.
- Offline option: printing the texts and giving them to the pairs of students who stick them on the relevant cell drawn on the whiteboard as follows:

| term | definition | example |
|------|------------|---------|
| | | |
| | | |

- Teacher’s questions:
 - What can be the risks and the advantages of the survey method?
 - Tell me examples for disciplines which may rely strongly on discourse analysis.
 - Which is the science the typical method of which is experimenting?
 - How would you start a literature review?
- Teachers’ short presentation on literature search indicating the most important databases that are free and available for the students of the given university ([Web of Science](#), [EBSCO Academic Search Complete](#), [Sage Journals - Social Sciences & Humanities](#), [Scopus](#), [ScienceDirect](#) etc.)
- The teacher continues the compilation of the common mind map on the discussed topics (by using Coggle (<http://coggle.it/>) : the mind map summarizing the content of the 1st Lesson and compiled by the teacher in Lesson 1

0-5 points/ student, based on right answers. Extra 1-5 points can be given in the case of active and correct answers regarding the errors in the questions

5 mins

| | | |
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| <p>will be further elaborated in the course of the whole Module.</p> <p>d) Watching a video about the required features of an adequate research question https://www.youtube.com/watch?v=71-GucBaM8U&feature=emb_logo (Alternatively, the text is available as well at this link https://www.scribbr.com/research-process/research-questions/ but in this case students may find the answers to the questions below.</p> <p><u>Group work:</u> Which of the research questions is more adequate and what can be the problem with the wrong one? The pairs of students answer the questions by filling in a table together and submitting them through the shared online interface. Worksheet is available in Annex 1.2.A Source and answers for the questions: https://www.scribbr.com/research-process/research-question-examples/</p> <p>d. First steps of PBL encompassing Lessons #2-4: discussing the main and the sub-topic of a research idea. Groups of 2 students can work together - a possible project can be that they are given one main problem, and 4 aspects (political, economic, legal and psychological), they give a report to the group and the entire picture can be achieved by that → mindmap on the whole topic</p> <p>Ideas for pre-defined real problems:</p> <ul style="list-style-type: none"> ● the impact of Covid-19 pandemic <ul style="list-style-type: none"> ○ economic challenges ○ impact on education ○ impact on health care system ○ impact on labour market, jobs ○ impact on consumption (webshops) ○ impact on international trade relations ○ impact on inter-state relations ○ impact on EU (possible solutions, future of EU, budget) ○ impact on the global powers (geopolitics) | | <p>20 min</p> |
|---|--|---------------|



| | | |
|---|----------------------------------|---------------|
| <ul style="list-style-type: none"> ○ legal aspects (restrictive measures, governance) ● climate change <ul style="list-style-type: none"> ○ economic challenges ○ energy market, energy policy ○ social impact ○ impact on health care ○ EU - policies, priorities, initiatives ○ agriculture ○ innovation ○ green deal - political sphere ○ migration policy ○ automobile industry ● aging society <ul style="list-style-type: none"> ○ impact on the economy ○ health care / social security system ○ society (generations) ○ labour market ● migration <ul style="list-style-type: none"> ○ health care / social security system ○ labour market ○ EU level: policies, politics, member states - political parties ○ education ● artificial intelligence <ul style="list-style-type: none"> ○ labour market ○ ethical issues ○ legal questions ○ economy ○ innovation ● From pre-defined real problems (for example ageing research community, one of the consequence of which is that the emphasis in (financial) management is shifted; generational tensions; coronavirus and digital revolution - new solutions in the workplace, social relations, entertainment, the rearrangement of the education); the class can choose one main topic | <p>5 mins</p> <p>0-10 points</p> | <p>5 mins</p> |
|---|----------------------------------|---------------|

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| <ul style="list-style-type: none"> ○ within which teams of 2 will define research narrower sub-topics (such as financial, environmental, psychological etc. consequences) ○ students make notes on the online interface shared with each other and the teacher. ○ Homework: start a literature review and reference collection <p>e. Introduction of the Template for Research Plan Outline (See Annex 1.1.A) by the teacher on the base of which they will develop their plans</p> <p>f. Quick wrap up by the teacher and end-of-lesson feedback from the students</p> <p>Each student gives a brief answer to the questions:</p> <ul style="list-style-type: none"> - What did you like in this lesson and why? - What was difficult for you and why? | | <p>5 minutes</p> |
|---|--|----------------------|

Additional resources for the teacher:

Research question:

- <https://methods.sagepub.com/book/social-research-methods>
- <https://methods.sagepub.com/base/download/BookChapter/social-research-methods/n6.xml>

Research theories

<https://methods.sagepub.com/base/download/BookChapter/social-research-methods/n2.xml>

Annex 1. 2. A - Template for Outlining a Research Plan

Template for Outlining a Research Plan

1. Name: _____
2. Grade: _____
3. Working title of the research:

4. Area of research

What science does your research belong to? Within it, is there any special sub-field where it can be categorized?

5. Literature review¹³:

A possible way to your start your literature review is using the databases of the Library (EBSCO, [Web of Science, etc.](#)). First, make a list of the main 3-4 expressions related to your topic, then search for each of them in the following way

- Type the given expression in the “Basic Search” field of the main page of the site
- In the Timespan menu, set the time period so that you get results from the last 15 years (by choosing “Custom year range” option)
- Sort the results by “Times cited” (you can set it in the top menu of the results page) so that the most cited ones will be on the top of the list of records
- Choose 4-5 relevant articles, and on the base of their introduction, you will get the necessary information for the questions below.

On the base of the introduction of at least 3 relevant studies, summarize the following: What have others said about this topic? What previous research exists? What are their main conclusions?

¹³ Besides the necessary bibliographical data, the short summary of the chosen piece of literature is needed, with a reference to its relevance to the research topic.

6. Research question(s) and its/their relevance

Within it, what exactly do you want to study? Why is this area worth studying?

7. Hypotheses/expected results

8. Methods to apply:

What/who are the subjects for your study? Whom or what will you study in order to collect data? How and what kind of data/information will you collect?

9. Schedule

What will be the main stages of your research and when are they planned to be implemented?

Total duration: months/weeks?

- Phase #1: Main goals: Duration:
- Phase #2: Main goals: Duration:
- Phase #3: Main goals: Duration:
- Phase #4: Main goals: Duration:
- Phase #5: Main goals: Duration:



Annex 1. 2. B - Research question examples

Source and answers for the questions: <https://www.scribbr.com/research-process/research-question-examples/>

Task: Underline the adequate research questions in the list below. What can be the problem with the one which is not good?

Research questions

1. What effect does social media have on people's minds?
2. What effect does daily use of Twitter have on the attention span of under-16s?
3. Why is there a housing crisis in the Netherlands?
4. What impact have university internationalisation policies had on the availability and affordability of housing in the Netherlands?
5. Does the US or the UK have a better healthcare system?
6. How do the US and the UK compare in health outcomes and patient satisfaction among low-income people with chronic illnesses?
7. What should political parties do about low voter turnout in region X?
8. What are the most effective communication strategies for increasing voter turnout among under-30s in region X?
9. Has there been an increase in homelessness in San Francisco in the past ten years?
10. How have economic, political and social factors affected patterns of homelessness in San Francisco over the past ten years?
11. What factors led to women gaining the right to vote in the UK in 1918?
12. How did Irish women perceive and relate to the British women's suffrage movement?

13. How can sexual health services and LGBT support services in district X be improved?
14. How can sexual health clinics in district X develop their services and communications to be more LGBT-inclusive?
15. Where do the majority of immigrants to Germany come from?
16. What are the similarities and differences in the experiences of recent Turkish, Polish and Syrian immigrants in Berlin?
17. How is race represented in Shakespeare's Othello?
18. How have modern adaptations of Shakespeare's Othello dealt with the theme of racism through casting, staging and allusion to contemporary events?
19. How can drunk driving be prevented?
20. What effect do different legal approaches have on the number of people who drive after drinking in European countries?



Annex 1. 2. C – Literature search handout

available at this link as well:

<https://www.dropbox.com/s/jpahi5ws1ts8suj/Literature%20search%20handout.pdf?dl=0>

| | Steps | Example |
|----|--|---|
| 1. | <p>Define your research question(s): First, brainstorm and collect more questions that seem to be relevant, concrete and feasible for you (in case of a real research study, it has to be gap-filling, adding something new to the already published research results). This may be changed during your research!</p> | <p>How did Irish women perceive and relate to the British women’s suffrage movement?</p> |
| 2. | <p>Identifying your keywords of the question (this should be expanded continuously):</p> <ul style="list-style-type: none"> ○ synonyms in the articles, titles, bibliography of the article ○ keywords indicated in relevant studies you found ○ thesauri (e. g. https://www.thesaurus.com/) ○ EBSCO Subject terms | <p>main key term: women’s suffrage synonyms, connected/broader terms: feminism, Britain, women’s rights, voting, rights of women, right to vote, right of representation, womanism, suffragism</p> |
| 3. | <p>(optional: compiling a conceptual network for your concept – illustrating the relation of the concept with each other)</p> | <p>see an example here</p> |
| 4. | <p>Search in the databases available free of charge in the Corvinus area and network. Start at Corvinus library’s homepage where you find a list of databases; many of them are discipline specific ones.</p> <ul style="list-style-type: none"> ○ Google Scholar https://scholar.google.com/ ○ EBSCO Academic Search Complete ○ Sage Journals - Social Sciences & Humanities ○ Web of Science ○ Scopus | <p>see the short video in the group folder on how to do it</p> |

Search techniques

1. The Boolean search (in most databases and in Google)

Always use quotation mark (“...”) when you search for an expression including more than one word

| | |
|---|---|
| women AND suffrage AND Britain | Using AND will narrow the search by ensuring material retrieved covers both phrases. |
| "women's suffrage" NOT "United States" | Using NOT will narrow a search on transferable skills alone by excluding any information that discusses US Women suffrage movements. |
| suffrage OR "voting right" | Using OR will broaden a search on suffrage by including matches on the synonym ability. |

Further info and test: [Boolean search tutorial](#)

2. Truncation

It is useful when searching for terms that can be reduced to a common stem and used with different endings. E. g. feminis* (to find feminist, feminism, feministic)

3. wildcard

It makes possible to able to replace none, one or more letters within a word by using question mark (?), e. g. using wom?n ensures that you find articles including both „woman” and „women”.

References

Aveyard, H. (2014). *Doing a literature review in health and social care: A practical guide*. Open University Press.

Gough, D., Oliver, S. & Thomas, J. (2017). Introducing systematic reviews. In *An introduction to systematic reviews* (3rd ed). Sage Publications Ltd.

An article describing further search techniques: <https://www.open.ac.uk/library/help-and-support/advanced-search-techniques>

EBSCO simple search https://www.youtube.com/watch?v=N_jdAA4uRiY

EBSCO advanced search <https://www.youtube.com/watch?v=n7-HO19Xxb0>

Video made for the current course is available [here](#)



Lesson 3 - Research integrity and ethical conduct

Learning outcomes to be developed:

- The student should understand the research project lifecycle and the role of RMAs within it.
- The students can discuss, formulate arguments and critically examine their beliefs in the context of real cases of scientific integrity, responsible research, ethical dilemmas that can emerge in the course of a research work project.
- The student is open to perceive and accept the diversity of cultural and social context of research systems and practices.

Legend for the use of lesson plans: Grey texts describe useful but optional activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|--|---------------|
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| <p>a. Playful activity enhancing recalling prior knowledge: - 5 minutes Kahoot: multiple-choice or true-or-false questions <i>Content of the questions will be related to the curriculum, e. g. What are the characteristics of a given research method? etc.</i></p> | <p><i>As this is a playful type of test but is a test anyway, students have to be informed about it (points, topics, time frame) in advance.</i></p> | <p>5 mins</p> |
| <p>b) Presentation of a real and famous research ethics dilemma (5 mins) & some basic rules of the dispute (Milgram, Philip Zimbardo, Laud Humphrey: description of the cases: Babbie, E (2010). <i>The practice of social research</i>. Wadsworth Cengage Learning. pp. 3-10. ISBN-13: 978-0-495-59841-1 http://ccftp.scu.edu.cn/Download/e6e50387-38f2-4309-af84-f4ceefa5baa.pdf)</p> <ul style="list-style-type: none"> • group formation on the base of individual opinions, and collecting arguments (5 mins) • group level debate when the group is represented by one of the members, in rotation (10 mins) Methodological guide for the teacher on how to manage a debate in the class: https://www.teachhub.com/classroom-activities/2016/03/classroom-activities-how-to-hold-a-classroom-debate/ • the real solution to the problem is summarized by the teacher (5 mins) | <p><i>Results (scores) should be counted into the end of semester grade.</i></p> | <p>25 mins</p> |
| <p>c) Presentation by the teacher: Research Ethics (20 mins)</p> <p>d) A new round of debate with a new problem, where students have to apply the arguments, approach and methods included in the teacher's presentation (structure is the same as in the first case) (25 mins) Source: z</p> <ul style="list-style-type: none"> • Everyday type of case studies for students in university environment, with short descriptions and solutions - special field: physics <p>https://www.aps.org/programs/education/ethics/upload/Ethics-Case-Studies-Teacher-Edition.pdf</p> | | <p>20 mins</p> <p>25 mins</p> |

| | | |
|--|--|----------------|
| <ul style="list-style-type: none"> • Case studies for researchers in academic environment, with short descriptions and solutions - special field: social sciences https://methods.sagepub.com/book/case-studies-ethics-in-academic-research-in-social-sciences <p>Suggested topics among the examples included in the publication: plagiarism, conflict of interest or acquisition of data</p> <p>d) PBL tasks</p> <p>Research plan (15 mins):</p> <ul style="list-style-type: none"> • the groups give a short report on their research focus in class • they present their list of literature • they formulate a broader list of possible research questions (6-8) • Formulating hypotheses <p>Homework:</p> <ul style="list-style-type: none"> • continuing literature review, • selection and/or fine tuning of one research question, formulating arguments supporting the selection | | 15 mins |
|--|--|----------------|

Readings for the teacher providing examples for the exercises

- Everyday type of case studies for students in university environment, with short descriptions and solutions - special field: physics
<https://www.aps.org/programs/education/ethics/upload/Ethics-Case-Studies-Teacher-Edition.pdf>
- Everyday type of case studies for researchers in academic environment, with short descriptions and solutions - special field: social sciences
<https://methods.sagepub.com/book/case-studies-ethics-in-academic-research-in-social-sciences>
- Case study exercises
<https://www.unodc.org/e4j/en/integrity-ethics/module-14/exercises/a-case-studies.html>

| | | |
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| <p>c) Class activity - the roles and tasks of RMAs</p> <p>Students find the place of the different roles and tasks of RMAs in the different project lifecycle stages.</p> <ul style="list-style-type: none"> • Every student gets a piece of paper with one of the roles/tasks listed in Annex 4.A (in case of online learning: students receive the roles in a table where they find a term describing a role besides their name and they fill in the table in the form of a Padlet exercise. Annex D: Description on how to use Padlet for this purpose can be found here.) • The teacher draws a half-empty table on the board (using the BESTPRAC RSS Framework (http://www.bestprac-wiki.eu/Tasks#Before_the_Proposal_.28A.29), See Annex 4.A) • Students stick their pieces of paper in the relevant cell of the table • The class discusses the results • Wrap-up and feedback from the teacher <p>(Alternatively, it can be accomplished by using a virtual whiteboard app, or a drag and drop exercise can be created in Moodle applying HSP activity.)</p> | | 10 mins |
| <p>d) Introducing the genre of “elevator pitch”</p> <p>Collecting answers</p> <ul style="list-style-type: none"> - what makes a presentation effective, enjoyable? Good practices and pitfalls (the visual appearance of the ppt, presentation mode (body language, tone, eye contact), the structure of the content, etc.) - Oral and written completion and summary by the teacher: general guidelines for presentations | | 5 mins |
| <p>e) Watching 3-4 elevator pitches (videos) - see the link to 6 videos in Annex 1.4.B</p> <ul style="list-style-type: none"> • What can be the purpose of such speeches? • What can be the situations where they are applied? • What are the differences between an elevator pitch and a presentation? • Alternative element: Teacher invites a (science) communication expert who completes the conclusions and gives general and | | 5 min |
| | | 15 min |
| | | 20 mins |

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| <p>practical advice about the genre - emphasizing the function and the importance of elevator pitch</p> <ul style="list-style-type: none"> • Or: Presentation and wrap-up by the teacher: completion of the answers, general guidelines for presentations - presentation is available in Annex 1. 4. C available at this link <p>Sources, templates, infographics for the elevator pitch are in Annexes below and in the references indicated in this lesson.</p> <p>f) PBL situational game Work in pairs - practicing elevator pitch. Students can use the sources used in Lesson 4 and the information gained in the classroom work</p> <p>Situation: The student is an RMA (or researcher) who recognizes that their institution should open an RMA position and he has to convince the management of his university about the necessity and the importance of this investment. Students are working in pairs.</p> <ol style="list-style-type: none"> 1. <u>Individual work</u>: compile an outline for an elevator pitch, keeping in mind the criteria included in the evaluation form (Annex 1. 4. B) - individual work 2. <u>Pair work</u>: students perform it to each other and record each other's speech by the camera of their cellphone 3. They upload videos to Moodle or send them for the teacher by email. 4. <u>Classroom activity</u>: 2 volunteering students show their video to the class; They are discussed and evaluated publicly by the teacher and the students (and the expert, if he is invited). (In the case of these videos, the teacher may need a written consent from students for the use of the material within the class work so please follow the institution's regulation regarding this question.) 5. Short feedback and evaluation by the teacher 6. Teacher (and the invited observer) evaluate the rest of the pitches for the next week 7. homework: students evaluate their peer's pitch at home, using the evaluation form (Annex 1. 4. B) | <p>Evaluating pitches: - teacher can give them a rating on a 1-10-point scale - if an external observer is invited, (s)he can give them points on a 1-10-point scale - students give their peers points using a 1-5-points scale</p> | <p>Instructions: 5 min</p> <p>Individual work: 5 min</p> <p>Work in pairs / breakout rooms: 7 min (1 pitch+ oral evaluation Coming back & upload: 2-3 min</p> <p>20 mins</p> |
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| <p>PBL task: the groups finalize their research plan:</p> <ul style="list-style-type: none"> • conclusions of the literature review, • selecting research questions • selecting research methods • setting goals and a timetable <p>Homework:</p> <ul style="list-style-type: none"> • Preparation for the elevator pitches presenting the research plans. The team members have to cooperate regarding the contents. The recommended way of sharing the work among the pairs of students is the following <ol style="list-style-type: none"> 1. in each pair, student “A” reports on the <ul style="list-style-type: none"> ▪ background, ▪ public benefits ▪ the conclusions of the literature published so far regarding the planned research activity; ▪ research question 2. student “B” reports on the <ul style="list-style-type: none"> ▪ hypothesis ▪ methods to apply with explanation and supporting arguments ▪ planned dissemination activities <p>Optional task for extra points: the pairs prepare infographics/ppt for their projects</p> <p>Optional/Alternative homework Let’s imagine that each group of students is a team within an institution, who recognize that their institution should open an RMA position. The task of the group is to compile a job announcement. Background material to be used for the task: <u>ARMA’s Professional Development Framework for Research Managers and Administrators</u>, p. 4-8</p> <ul style="list-style-type: none"> ○ For this, they have to assemble the competences/tasks of an RMA (educational background, competences, skills, knowledge). ○ Students read and use the text of Lesson 4 for this task ○ After the groups upload the result of their work, the teacher projects them, and the groups evaluate/compare each others’ announcements | | |
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| <ul style="list-style-type: none">○ the teacher summarizes and completes them by referring to the results of the previous research. | | |
|---|--|--|

Sources for the teacher that can be optionally used in the classwork as well

Guides & examples on the method of elevator pitch:

- <https://felician.edu/wp-content/uploads/2019/10/tough-interview-questions.pdf>
- <https://www.atlassian.com/team-playbook/plays/elevator-pitch>
- <https://www.cmu.edu/career/documents/quick-tips/elevator-pitch.pdf>
- <https://onlinebusiness.northeastern.edu/master-of-business-administration-mba/knowledge/elevator-pitch-guide/pitch-examples/>



Annex 1. 4. A Presentation for the lesson

see the ppt file at this link:

https://www.dropbox.com/s/seq4vqelzmn8uka/Annex_1.4.A_Module%201%20Lesson%204%20-%20lesson%20presentation_CO.potx?dl=0



Module 1 | Lesson 4
RMAs as Professionals at the Interface of Science

C2: Short Term Joint Staff Training for Teachers and Professors
to Prepare Them to Teach the International Curriculum

16 November 2020

Venue: Universidade NOVA de Lisboa
Cristina Oliveira, NOVA FCSH

Co-funded by the
Erasmus+ Programme
of the European Union



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European Union's Erasmus+ programme
under the registration number
2019-1-HU01-KA203-061233.



WHO ARE THE RESEARCH MANAGER AND ADMINISTRATORS (RMA)?



Co-funded by the
Erasmus+ Programme
of the European Union



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European Union's Erasmus+ programme
under the registration number
2019-1-HU01-KA203-061233.



Different roles that an RMA can play?

- Communicator + Facilitator - reseachers - academia - industry
- Solve a problem: rules / elegibility / project management
- grant reviewing: scope Vs. tasks
- Look for funding opportunities
- Gather/ organize / Provide information
- Ethics consultant

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Based on Association of RMA (ARMA) Professional Development Framework

Developing proposals



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Based on Association of RMA (ARMA) Professional Development Framework

Project Lifetime



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Based on Association of RMA (ARMA) Professional Development Framework

Translation



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Based on Association of RMA (ARMA) Professional Development Framework

Postgraduate researchers



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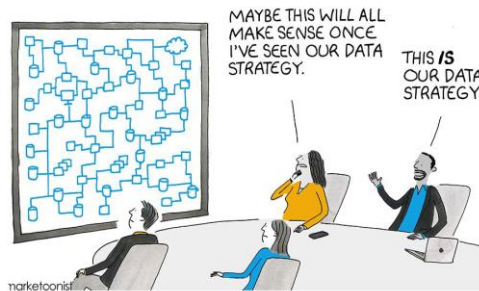
Based on Association of RMA (ARMA) Professional Development Framework

Policy and Governance



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Management information and related functions



marketoonist

Co-funded by the Erasmus+ Programme of the European Union



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Service organisation and delivery



shutterstock.com • 1689710926

Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

RMA: a career in progress

Is the need for RMA professionals new?

Increasing need for RMA in the R&I ecosystem in the past few decades

Is the RMA a recognized profession all over Europe?

Professionalization in different rhythms and speeds

What are the boundaries of this profession?

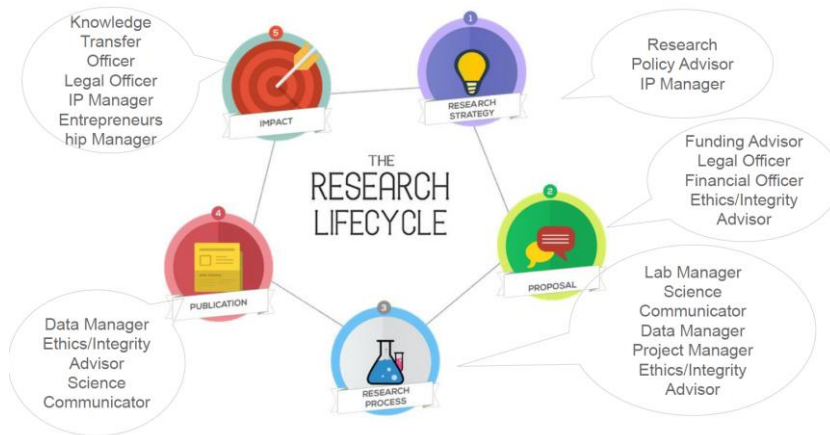
Research support activities - Professionals at the Interface of Science

Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.





Let's work!

Annex 1. 4. B - The roles and tasks of RMAs

Source: BESTPRAC RSS Framework (http://www.bestprac-wiki.eu/Tasks#Before_the_Proposal_.28A.29)

List of tasks to be distributed for students:

- Identifying funding opportunities (finding)
- Disseminating funding
- Advising
- Training
- Gathering non-public information
- Quantitative and qualitative analysis of EU funding and organisational participation
- Providing general information and support regarding proposal submission
- Facilitating and setting up of internal approval and signature process
- Providing budget notes and explaining + enforcing internal budget rules
- Advise on the execution of the writing process and consortium formation and management
- Advise on the content to be written (vs writing process)
- General advising on legal aspects and providing organisational legal documents
- Linking to information or advising on IP, ethics, open access and open data
- Statistics and analysis
- Facilitating the signature of the grant agreement
- Facilitating the internal setup of the project
- Internal and external communication strategies
- Reviewing and discussing the GA and the grant preparation with the PI
- Facilitating the consortium agreement and handling related issues
- Communicating project success (internal and external)- Supporting financial and technical reporting
- Consortium management
- Communicating internal procedures
- Functioning as a helpdesk and providing administrative support
- Contracts management and archiving
- Support for amendments of the Grant Agreement and Consortium Agreement

Half-empty table to draw on the board:

| Research lifecycle stage | RMA tasks and roles |
|----------------------------|---------------------|
| Before the proposal | |
| Proposal | |
| Grant preparation | |



| | |
|----------------|--|
| Project | |
|----------------|--|

Solution:

| Research lifecycle stage | Before the proposal | Proposal | Grant preparation | Project |
|----------------------------|--|--|---|--|
| RMA tasks and roles | <ol style="list-style-type: none"> Identifying funding opportunities (finding) Disseminating funding Advising Training Gathering non-public information Quantitative and qualitative analysis of EU funding and organisational participation | <ol style="list-style-type: none"> Providing general information and support regarding proposal submission Facilitating and setting up of internal approval and signature process Providing budget notes and explaining + enforcing internal budget rules Advise on the execution of the writing process and consortium formation and management Advise on the content to be written (vs writing process) General advising on legal aspects and providing organisational legal documents Linking to information or advising on IP, ethics, open access and open data Statistics and analysis | <ol style="list-style-type: none"> Facilitating the signature of the grant agreement Facilitating the internal setup of the project Internal and external communication strategies Reviewing and discussing the GA and the grant preparation with the PI Facilitating the consortium agreement and handling related issues Communicating project success (internal and external)- | <ol style="list-style-type: none"> Supporting financial and technical reporting Consortium management Communicating internal procedures Functioning as a helpdesk and providing administrative support Contracts management and archiving Support for amendments of the Grant Agreement and Consortium Agreement |

Annex 1. 4. B - Examples for elevator pitch and evaluation table

Examples for elevator pitch videos:

1. Connecting two problems to find a common solution: Youth unemployment and mass termination of SMEs <https://www.youtube.com/watch?v=gXwewPgLmkE>
2. Women users' needs in technology <https://www.youtube.com/watch?v=dqIEE-g-Uc>
3. CEO of Podio, a platform for work connections (First 1 minute): <https://www.youtube.com/watch?v=UBNJh2rOOII>
4. Leader and founder of Pitch Academy (first 20 seconds): https://pitch-professionals-academy.teachable.com/p/pitch-to-win-investment-and-resources/?product_id=909872&coupon_code=XSO60
5. Mamma I want to write - ghost writers https://www.youtube.com/watch?v=U0_NYHT9f50
6. Mission and values behind a Coffee Shop <https://www.youtube.com/watch?v=4CgkXZmqINE>

Background resources about elevator pitch:

- <https://www.indeed.com/career-advice/career-development/perfect-elevator-pitch>
- <https://elevatorpitchgenerator.com/>
- <https://hbr.org/2014/12/your-elevator-pitch-needs-an-elevator-pitch>
- <https://www.valuer.ai/blog/why-your-elevator-pitch-sucks>
- <https://www.atlassian.com/team-playbook/plays/elevator-pitch>
- <https://www.cmu.edu/career/documents/quick-tips/elevator-pitch.pdf>
- <https://onlinebusiness.northeastern.edu/master-of-business-administration-mba/knowledge/elevator-pitch-guide/pitch-examples/>

Evaluation table:

| Evaluation table for the elevator pitch | | |
|---|--|----------------------------------|
| | | Number of points given by |

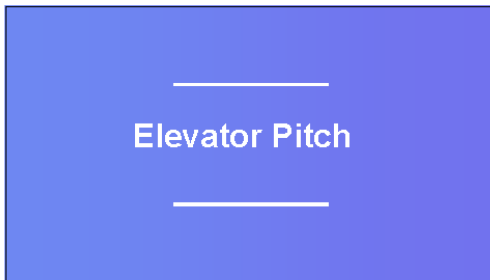
| | | peer student 0-5 | observer 0-10 | teacher 0-10 |
|----|--|---------------------|------------------|-----------------|
| 1. | Style and performance: Is the style in line with the interest and the language of the audience? Will they find it catchy/attractive? | | | |
| 2. | Language: Is the text coherent, linguistically correct and easy to follow? | | | |
| 3. | Arguments: How convincing and effective are the selected arguments and the overall pitch? | | | |
| 4. | Content: Does it contain relevant, necessary and sufficiently detailed information (not too much, not too little)? | | | |
| 5. | Duration: Did the presenter keep the time limit? | | | |
| | Sub-total | | | |
| | Total | | | |



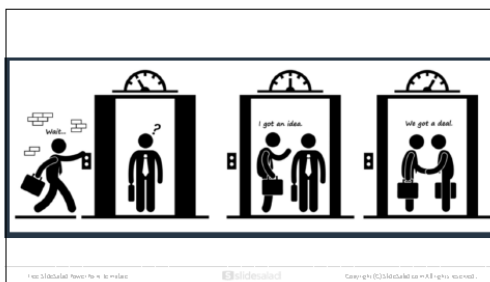
Annex 1. 4. C - Presentation slides – elevator pitch

Available at this link:


https://www.dropbox.com/s/5l4kon4jb3dbuy9/Pitch_presentation.pptx?dl=0



1




2



„a brief, persuasive speech that you use to spark interest in what your organization does. You can also use them to create interest in a project, idea, product – or in yourself”

Source: <https://www.linkedin.com/company/foformation/updates>

3



WHERE?

- Elevator
- Coffee breaks
- Brokerage events
- career fair
- membership events
- professional networking
- internal networking (your colleagues and leaders)
- Job interview

4



• Examples

1. <https://www.youtube.com/watch?v=pXwwFqLmkE> from 0:10
2. https://www.youtube.com/watch?v=dqIEE_g_Uc
3. A product: <https://www.youtube.com/watch?v=UBN-Jh2rQQII> (first 20 seconds)
4. https://pitch-professionals-academy.teachable.com/p/pitch-to-win-investment-and-resources/?product_id=909872&coupon_code=XSC60
5. Action research in Bangladesh <https://www.youtube.com/watch?v=Q1aF65R8yYk>
6. https://www.youtube.com/watch?v=UO_NYH19f9Q
7. Research pitch https://www.youtube.com/watch?v=Z_qvF1AT5wY
8. Brokerage event pitch <https://vimeo.com/45343660> from 2:08:02



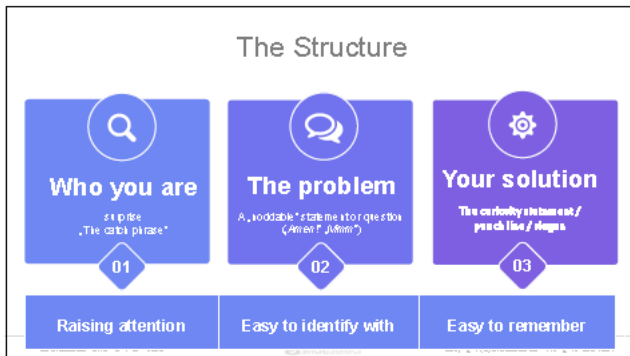
5

HOW IS IT?


30-90 seconds
convincing
emotional
unique: striking / catchy



6



7



WHAT? – One SINGLE message that make your audience exited about your work

1. The context – a problem to solve
2. How will you answer or solve it, what do you need for that? (punchline)
3. Prove them: Why you are the best person (yours is the best organization) to do this?

8





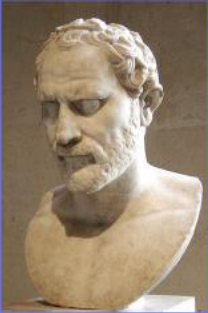
Useful tips

- > Do not hurry, be relaxed
- > Make a professional impression **BUT** be understandable (no jargon, short sentences)
- > What are the interests of your audience? show them why is your idea so important for **THEM!**
- > Show emotions and make them excited, too!
- > Less is more - Share that 1 single message, with simple words
- > Repeat your key message with the same words, more times
- > keep pauses, especially before and after the key message
- > Practice

9

DEMOSTHENES


"the perfect orator who lacked nothing,, (Cicero)
"THE standard of oratory"
who "stands alone among all the orators,, (Quintilian)



10



11



Evaluation criteria for pitches

1. **Style and performance:** Is the style in line with the interest and the language of the audience? Will they find it catchy/attractive?
2. **Language:** Is the text coherent, linguistically correct and easy to follow?
3. **Arguments:** How convincing and effective are the selected arguments and the overall pitch?
4. **Content:** Does it contain relevant, necessary and sufficiently detailed information (not too much, not too little)?
5. **Duration:** Did the presenter keep the time limit?

12

Lesson 5: Present and discuss a research plan

Learning outcomes to be developed:

- The student can apply the stages of the research project life cycle to a research plan, identifying the key questions to answer at each stage.
- The student can predict the needs for research interface activities along the research project lifecycle and identify key RMA roles (e.g. Funding Advisory, Project Manager, Science Communicator).
- The student is committed to find a balance between assertiveness and cooperation in the course of teamwork in research as a leader and as team member.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| | | |
|--|--|---------------|
| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|--|---------------|

| | | |
|---|---|--|
| <p>Reporting on research plans:</p> <ul style="list-style-type: none"> • Pairs of students present their research plan in the frame of an international webinar • An RMA or communication expert is invited for the class, introduces him-/herself (in the form of elevator pitch) and provides professional feedback for the pitches • Every student holds a presentation using the tool of “elevator pitch” and infographics to present the results of their work. • Way of sharing the work among the pairs of students: in each pair, student “A” reports on the <ul style="list-style-type: none"> ▪ background, ▪ public benefits ▪ the conclusions of the literature published so far regarding the planned research plactivity ▪ research question ○ student “B” reports on the <ul style="list-style-type: none"> ▪ hypothesis ▪ methods to apply with explanation and supporting arguments ▪ planned dissemination activities <p>Homework: submission of the final versions of the research plans, corrected and completed according the feedback received on the lesson</p> | <p>Combination of peer-, self- and teacher evaluation based on predefined categories. Evaluation of the homework is carried out by the teacher.</p> <p><i>Template with questions in the annex is being elaborated.</i></p> | |
|---|---|--|

Sources for the teacher

Thody Angela (2006): *Writing and Presenting Research*

<http://elearn.luanar.ac.mw/odl/public/Files/Angela%20Thody's%20Writing%20and%20Presenting%20Research.pdf>



Annex 1. 5 - Evaluation criteria for the elevator pitch

| Evaluation table for the elevator pitch | | | | |
|---|--|---------------------------|------------------|-----------------|
| | | Number of points given by | | |
| | | peer student 0-5 | observer 0-10 | teacher 0-10 |
| 1. | Style and performance: Is the style in line with the interest and the language of the audience? Will they find it catchy/attractive? | | | |
| 2. | Language: Is the text coherent, linguistically correct and easy to follow? | | | |
| 3. | Arguments: How convincing and effective are the selected arguments and the overall pitch? | | | |
| 4. | Content: Does it contain relevant, necessary and sufficiently detailed information (not too much, not too little)? | | | |
| 5. | Duration: Did the presenter keep the time limit? | | | |
| | Sub-total | | | |
| | Total | | | |

Module 2 - Research Funding, Policy and Governance

Lesson 1 Policy drivers, research agendas, European research policy

Learning outcomes to be developed:

- The student can identify major policy drivers (e.g. UN developmental goals, cross-cutting issues) and assess their influence in shaping research agendas.
- The student can identify examples of societal and economic drivers impacting and defining research policy (e.g. the COVID 19 situation).
- The student can differentiate between policy and strategy and identify suitable examples in the context of research institutions and processes.
- The student can discuss and formulate arguments and confront opinions in the context of real cases of scientific policies
- The student demonstrates curiosity and interest for systemic approaches and for the organization of the research ecosystem.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|---|----------------|
| a) Evaluation of prior knowledge and competences - 10 minutes Answers to basic questions assessing the understanding of the main topics discussed by Lesson 1 of Module 1 (students have to read it in advance, at home) Application to use: Kahoot test (after registering, at Kahoot homepage, you can create easily games helping assessment here (https://create.kahoot.it/auth/login?next=%2Fcreator Choose "Kahoot for formative assessment)) | <i>(Results (scores) should not be counted into the end of semester grade)</i> | 10 mins |

| | | |
|--|--|--------------------------|
| <p>b) Frontal presentation by the teacher (15 mins) on the base of Module 2, Lesson 1 and the answers provided by the students: Goal: providing a framework for the lesson (general information about the policy drivers, European research policy for example), also laying down the foundations regarding the definition and characteristic features of the concepts of policy and strategy</p> | | <p>15 mins</p> |
| <p>Activities helping the understanding of theoretical foundations c) Brainstorming on external and internal drivers of research policy using word cloud by Mentimeter (5 min) + short summary of the lecturer (of the external and internal drivers) (5 mins)</p> | | <p>10 mins</p> |
| <p>d) think-pair-share (or <i>write-pair-share</i>) using the “A renewed European Agenda for Research and Innovation - Europe's chance to shape its future” excerpt from the EC’s document. The students get a short list of questions, which they think of while reading the excerpt (3 mins), then form pairs and answer the question(s) (5 mins). Afterwards they share their ideas in class (5 mins). A template can be created before the class including the question, place of the individual answers, then answer of the group, and also leaving space for those elements that the group did not include. (appr. 15 mins) + short summary of the lecturer (of the external and internal drivers) (5 mins)</p> | | <p>35 mins</p> |
| <p>or students work in pairs: based on the given dates of the source indicated, the students collect the contemporary trends, policy drivers. (Collect minimum 5 (?)) (10 mins)+ short summary of the lecturer (of the external and internal drivers) (5 mins)</p> | | <p>or 20 mins</p> |
| <p>e) Snowballing: starting with groups of two - one pair discuss either policy or strategy (characteristics) - based on the reading assigned, then they form groups of four (one 2-member group was discussing policy, the other strategy), they “teach” each other of the characteristic features, and list those. The class discusses the findings together, then the groups receive examples of documents on research and innovation in Europe, and they assign them to either categories. (cca. 25 mins)+ short summary of the lecturer (of the external and internal drivers) (5 mins)</p> | | <p>30 mins</p> |

Lesson 2: the Funding research framework: funding programmes and calls

Learning outcomes to be developed:

- The student can understand and contextualise European research funding frameworks and main European funding programmes and schemes to support research and innovation activities (e.g. Horizon Europe).
- The student can analyse a given European call for funding from the perspective of its underlying policy (need for the call) and proposal (goals, activities, and expected outcomes and impact).
- The student can distinguish and discuss at which stage of policy and strategy development intervene pre-award and research policy/strategy related professions.
- The student demonstrates curiosity and interest for systemic approaches and for the organization of the research ecosystem.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| | | |
|--|---|----------------------|
| <p>Teaching ideas: Methods, tools, illustration, problem, game etc.</p> | <p>Evaluation and suggested scores</p> | <p>Timing</p> |
|--|---|----------------------|

| | | |
|---|---|---|
| <p>a. Short revision of the main points of the first lesson (5 mins):</p> <ul style="list-style-type: none"> • Kahoot test (after registering, at Kahoot (https://create.kahoot.it/auth/login) homepage, you can create easily games helping assessment here (https://create.kahoot.it/auth/login?next=%2Fcreator)) • OR virtual whiteboard (linoit.com for example) | <p><i>Results (scores) should be counted into the end of semester grade</i></p> | <p>5 mins</p> |
| <p>b) Frontal presentation by the teacher (20-25 mins):</p> <ul style="list-style-type: none"> • The goal of the presentation is to give an insight to the context of EU funding schemes, and on the general characteristic features of calls. See the ppt usable for this presentation in Annex 2.2.A • short presentation with the use of a call for tender (see Annex 2.2.B) helping students to show them the most important parts, details of the rather long texts (see table in text). How to find the most important parts of them - it will help them to be able to find the most relevant bits of information. Specific questions can give help for the students to accomplish the task. | | <p>25 mins</p> |
| <p>c) Short analysis of a typical funding call for proposal (15 mins)</p> <ul style="list-style-type: none"> • short presentation helping students to show them which are the most important parts, details of the rather long texts (see Table 1 below). How to find the most important parts of them - it will help them to be able to find the most relevant bits of information. Specific question can give help for the students to accomplish the task. See examples for calls in Annex 2. 2. E available here: https://www.dropbox.com/sh/ijjr1vkobqp0ocz/AACf4rb9O16gl3kAAhcfMHZRd?dl=0 • Idea for gamification: Quiz competition with Mentimeter Questions are taken in the frame of a competition and a ranking can be seen immediately according to the right answers <ul style="list-style-type: none"> ○ <u>The text of the call</u> used for this task is available in Annex 2.2.C | | <p>15 mins</p> <p>25 mins</p> |

- Note for the teacher: It is recommended that students submit their answers in the form of an online questionnaire as [Google Forms \(https://www.google.com/forms/about/\)](https://www.google.com/forms/about/) because it is more visible and thus increases students' activity and can be used for evaluating classroom activity. Guide for the teacher for the use of Google Forms for classroom activities is available in [Annex C](#). In this case, it is recommended
 - to start the questionnaire with the indication of student's name (enabling identification of the answers)
 - to uncheck in the Settings the "Edit after submit" option
 - to check the "See summary charts and text responses" option

Results (scores) should not be counted into the end of semester grade

Table 1

| | |
|--|--|
| Need (policy context): the higher level objective(s) towards which the project is expected to contribute | |
| Objectives: The effect which is expected to be achieved as the results of the project | |
| Activities that have to be undertaken by the project in order to produce outputs | |
| Outcomes & Impact: the wider effects of the project's outputs that can happen after the project ends | |
| Funding: Which organization is providing the financial support for the activities? | |
| Partnership: What are the requirements related with partners? E. g. Does it require partnership? At least how many? Do you need international partners? | |

- the teacher can show and the class can discuss the answers collected by the class according to the tips shared in [Annex C](#).

Group work:

- Discussion of the following questions:



| | | |
|---|--|--|
| <ul style="list-style-type: none"> ○ What can be the risky elements of the future projects based on this call? ○ In case you were the manager of a project supported by this call, which 5 key “result” elements would you select as the most important ones that you would pay special attention? <p>e) Classroom work: The teacher briefly introduces the Funding and Tenders portal</p> <ul style="list-style-type: none"> ● on the base of Module 2, Lesson 2 of the curriculum ● as well as the portal’s different guides: <ul style="list-style-type: none"> ○ https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/how-to-participate/1/1 ○ https://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm ○ https://ec.europa.eu/research/mariecurieactions/node_e_n ○ https://erc.europa.eu/ <p>e) PBL - Activities developing students’ skills (10-15 mins) Forming groups of 4, out of the groups of 2 formed in Module 1, according to the similarities of their research project ideas. Tasks for this lesson:</p> <ul style="list-style-type: none"> - discussing and setting the common research questions that can be interesting for the group members: aims, goals for an ideal research project - browsing the Funding and Tenders Portal’s database (bit.ly/3gyU4gv) and searching at least 2-3 calls for tender which can be suitable for the realization of some of their main research aims. It is recommended that students choose “Open for submission” option in the “Submission status” field. <p>f) Quick end-of-lesson feedback for the teacher - 5 minutes Competition by Socrative or Wordwall game with quiz questions related to the content of the lesson.</p> <p>Individual homework:</p> | | |
|---|--|--|

- | | | |
|---|--|--|
| <ul style="list-style-type: none">• For the first part of the week: Each student has to identify at least one further call that seems to be suitable for the research aims of the group. Students should be encouraged to select calls where international consortium is required and they should select from different funding programmes and instruments to see the diversity• Write a sentence why the specific call would be suitable for the research topic of the group <p>(Teacher’s homework: take a look at the calls and reasonings of students before the next lesson, and prepare feedback on them (before the lesson), also can choose the most appropriate one.)</p> | | |
|---|--|--|



Annex 2.2.A Teacher's presentation

Ppt file is available at this link:

https://www.dropbox.com/s/iwuin59vgfsrgnx/Annex_2.2.B_Module%20%20Lesson%20%20presentation.pptx?dl=0



Lesson 2 - The Funding research framework: funding programmes and calls

Margarida Trindade 17 November 2020

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Introduction to European funding

- A vision for the world relying on the UN Sustainable Developmental Goals (SDGs)
- A vision for Europe: to create a sustainable and prosperous future for people and the planet
- European policy define a research funding framework (funds)
- EU 2020 Strategy for Growth
- Research and innovation to attain competitiveness, growth and sustainability
- <https://youtu.be/P62sjnHL59w>

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Introduction to European funding

- ¼ EU funding is jointly managed (EU funding via Member States)
 - Structural & Investment funds
 - European Regional Development Fund (ERDF)
 - European Social Fund (ESF)
 - European agricultural fund for rural development (EAFRD)
 - European maritime and fisheries fund (EMFF)
 - Cohesion Fund (CF)
- ¼ managed directly by the EU: Grants & Calls for proposals
 - European funding programmes
 - ERASMUS Plus Programme (EPLUS)
 - Programme for the Environment and Climate Action (LIFE)
 - Creative Europe (CREA)
 - Horizon 2020 Framework Programme (H2020) / Horizon Europe

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The **Horizon Europe** (2021-2027) and its predecessor the **Horizon 2020** (2014-2020)

https://youtu.be/g8BQnX6_kY

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- Create skilled jobs for the future
- Strengthen links between EU Members and beyond
- Develop skills through mobility

Idea 1
Bring great ideas to life, Excellent research, ground breaking R&I, Top class research infrastructures

Idea 2
Tackle global challenges, solve specific societal problems (e.g. cancer, energy efficient houses, zero emission transport)

Idea 3
Foster breakthrough innovation, create new markets of the future, tackle industrial competitiveness

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THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

HORIZON 2020

Excellent Science

- European Research Council
- Future and Emerging Technologies
- Marie Curie Actions
- Research Infrastructures

Industrial Leadership

- Leadership in Enabling & Industrial Technologies
- Information and communications technologies
- Advanced materials
- Advanced manufacturing and processing
- Space
- Access to Risk Finance
- Innovation in SMEs

Societal Challenges

- Health, Demographic Change and Wellbeing
- Food security, sustainable agriculture, marine and maritime research and the bio-economy
- Energy
- Secure, clean and efficient
- Integrated Transport
- Climate Action, Resilience, Efficiency and Raw Materials
- Europe in a changing world
- Innovative and Reflective Societies
- Secure Societies
- Investing in Resilience and Security of Europe and its Citizens

Widening Participation

- Joint Research Centre (JRC)
- Science with & for Society
- European Institute of Innovation and Technology (EIT)
- Joint Programming P2P
- Joint Technology Initiatives P2I

Widening Participation and Strengthening the European Research Area

- Widening participation and spreading excellence
- Reforming and Enhancing the European R&I system

MARIE SKŁODOWSKA-CURIE ACTIONS
Research Fellowship Programme

The Marie Skłodowska-Curie actions support researchers at all stages of their careers, regardless of age and nationality. Researchers working across all disciplines are eligible for funding. The MSCA also support cooperation between industry and academia and innovative training to enhance employability and career development.

MSCA Actions



Co-funded by the Erasmus+ Programme of the European Union This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

erc European Research Council
Supporting top researchers from anywhere in the world

CALL CALENDAR 2021

TENTATIVE DATES

- Starting Grants | ERC-2021-SIG**
Open: 12-01-2021
Deadline: 08-03-2021
- Consolidator Grants | ERC-2021-CoG**
Open: 21-01-2021
Deadline: 20-04-2021
- Advanced Grants | ERC-2021-AdG**
Open: 20-06-2021
Deadline: 31-08-2021
- Proof of Concept | ERC-2021-PoC**
Open: 14-01-2021
Deadline: 16-03-2021, 17-06-2021, 20-10-2021
- Synergy Grants**

NEWS

- 05-11-2020: ERC announces 34 new Synergy Grants
- 08-10-2020: Commission appoints independent Search Committee and invites nominations and applications to fill the post of the next President of the European Research Council
- 28-10-2020: New agreement signed for Indian top talent to join ERC research teams in Europe

European Research Council (ERC) grants

Co-funded by the Erasmus+ Programme of the European Union This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.



What are the core Widening actions?

Widening consists of three main actions, i.e. **Teaming, Twinning and ERA Chairs**, for which specific eligibility conditions apply. This ensures a targeted approach towards Widening Member States and Associated Countries. The Member States currently eligible for Widening support are: Bulgaria, Croatia, Cyprus, Czechia, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.



The Associated Countries currently eligible for Widening support are (subject to valid association agreements of third countries with Horizon 2020): Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, The Republic of North Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.

Widening Programme

Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

Mission oriented research in Pillar 2 of Horizon Europe

- Global Societal Challenges demand for goal oriented research - Missions
- <https://youtu.be/KlvjfPgWdKg>
- Partly inspired by the Apollo 11 mission to put a man on the moon, each mission is a mandate to solve a pressing challenge in society within a certain timeframe and budget

Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

How to know what is to be funded?

- Cluster/Mission/Programme
 - Work Programme
 - Call for proposal
 - Topic

Guiding documents

Call for proposal
Work programme
Guide for applicants
Guide for peer reviewers
Ethical guidelines

Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.



The Call for Proposals

Uniform format independently of the context of the text

- **Heading** containing basic information such as the name of the programme, name of the call, type of action, date of publication and deadline
- **Specific challenge**
- **Scope**
 - Activities
 - Amount of funding available and expected duration for the project
- **Expected Impact**

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Call for proposal - Heading

| Twinning | |
|------------------------------|---|
| TOPIC ID: WIDESPREAD-05-2020 | |
| Grant | |
| General Information | |
| Topic updates | Programme: Horizon 2020, Work programme part: Spreading Excellence and Widening Participation |
| Topic description | Call: WIDESPREAD (H2020-WIDESPREAD-2018-2020), Work programme year: H2020-2018-2020 |
| Conditions and documents | Submission service: See budget overview |
| Topic related FAQ | Type of action: CSA Coordination and support action, Status: Closed |
| Get support | Deadline mode: single-stage, Opening date: 24 July 2019, Deadline date: 14 November 2019 17:00:00 Brussels time |
| Call information | |

Co-funded by the Erasmus+ Programme of the European Union  This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

Call for proposal – Specific Challenge & Scope

| Topic description |
|--|
| <p>Specific Challenge:</p> <p>The specific challenge is to enhance networking activities between the research institutions of the Widening countries and internationally-leading counterparts at EU level. Driven by the quest for excellence, research intensive institutions tend to collaborate increasingly in closed groups, producing a crowding-out effect for a large number of promising institutions. This is the challenge that a specific Twinning action will try to address.</p> <p>Scope:</p> <p>Twinning aims at significantly strengthening a defined field of research in a university or research organisation from a Widening country by linking it with at least two internationally-leading research institutions from two different Member States or Associated Countries. Twinning will:</p> <ol style="list-style-type: none"> 1. Enhance the scientific and technological capacity of the linked institutions with a principal focus on the university or research organisation from the Widening Country; 2. Help raise the research profile of the institution from the Widening country as well as the research profile of its staff. <p>Successful Twinning proposals will have to clearly outline the scientific strategy for stepping up and stimulating scientific excellence and innovation capacity in a defined area of research as well as the scientific quality of the partners involved in the twinning exercise. This scientific strategy should include arrangements for formulating new (or ongoing) joint research project(s) in the scientific area of choice and describe how Twinning will take this research to a new stage, by enlarging its scope and/or the research partnership. If relevant, any links with sustainable development objectives are to be outlined.</p> <p>Such a strategy should include a comprehensive set of <u>activities to be supported</u>. These should include at least a number of the following: short term staff exchanges; expert visits and short-term on-site or virtual training; workshops; conference attendance; organisation of joint summer school type activities; dissemination and outreach activities.</p> |

Call for proposal – Expected Impact

Therefore, for grants awarded under this topic and type of action the following cost categories will be ineligible costs:

- infrastructure costs;

The respective option of Article 6.5.C of the Model Grant Agreement will be applied.

The duration of a Twinning project can be up to 3 years.

If the coordinating entity has already been funded (as a coordinator) under other Horizon 2020 Twinning calls, these projects need to be described in the proposal. In particular clearly demonstrate the added value and impact of the proposal in achieving the Twinning programme objectives, in comparison to the already funded Twinning project with entity.

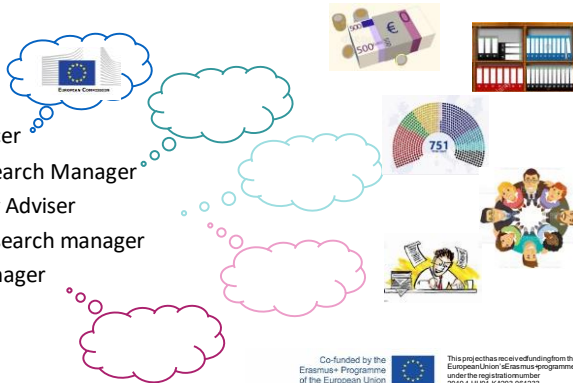
The Commission considers that proposals requesting a contribution from the EU of EUR 0.9 million, would allow this specific challenge to be addressed appropriately. Noneed preclude submission and selection of proposals requesting lower amounts.

Expected Impact:

- Increased research excellence of the coordinating institution in the particular field of research as a result of the twinning exercise.
- Enhancing the reputation, attractiveness and networking channels of the coordinating institution.
- Improved capability to compete successfully for national, EU and internationally competitive research funding.

RMA roles

- EC Project Officer
- Pre-award Research Manager
- Research Policy Adviser
- Post-award Research manager
- EU Project Manager



Co-funded by the Erasmus+ Programme of the European Union



This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.

Annex 2.2.B CALL WIDESPREAD-05-2020 for frontal presentation

Twinning

WIDESPREAD-05-2020

Programme

Horizon 2020

Work programme part

Spreading Excellence and Widening Participation

Call

WIDESPREAD (H2020-WIDESPREAD-2018-2020)

Work programme year

H2020-2018-2020

Type of action

CSA Coordination and support action

Deadline model

single-stage

Opening date

24 July 2019

Deadline date

14 November 2019 17:00:00 Brussels time

Specific Challenge:

The specific challenge is to enhance networking activities between the research institutions of the Widening countries and internationally-leading counterparts at EU level. Driven by the quest for excellence, research intensive institutions tend to collaborate increasingly in closed groups, producing a crowding-out effect for a large number of promising institutions. This is the challenge that a specific Twinning action will try to address.

Scope:

Twinning aims at significantly strengthening a defined field of research in a university or research organisation from a Widening country by linking it with at least two internationally-leading research institutions from two different Member States or Associated Countries. Twinning will:

1. Enhance the scientific and technological capacity of the linked institutions with a principal focus on the university or research organisation from the Widening Country;
2. Help raise the research profile of the institution from the Widening country as well as the research profile of its staff.

Successful Twinning proposals will have to clearly outline the scientific strategy for stepping up and stimulating scientific excellence and innovation capacity in a defined area of research as well as the scientific quality of the partners involved in the twinning exercise. This scientific strategy should include arrangements for formulating new (or ongoing) joint research project(s) in the scientific area of choice and describe how Twinning will take this research to a new stage, by enlarging its scope and/or the research partnership. If relevant, any links with sustainable development objectives are to be outlined.

Such a strategy should include a comprehensive set of activities to be supported. These should include at least a number of the following: short term staff exchanges; expert visits and short-term on-site or virtual training; workshops; conference attendance; organisation of joint summer school type activities; dissemination and outreach activities.

A dedicated focus towards promoting the involvement of early stage researchers (as per the MSCA definition^[1]) in the coordinating institution from the Widening country is expected. This should take the form of a dedicated work package or task in the proposal describing activities dedicated to early stage researchers from the coordinating institution that could include training, mentoring and networking measures within the Twinning exercise, with a special focus on the promotion of gender equality among early stage researchers.

One of the lessons learned from previous calls and from the interim evaluation of Horizon 2020, is the lack of experience with regard to research management and administration in widening countries. That is why proposals should also focus on strengthening the research management and administration skills of the coordinating institution from the Widening country. This should take the form of a dedicated work package or task, placing emphasis to specific activities, in view of helping the staff of the coordinating institution to improve their proposal preparation and project management/administration skills. If not yet in place, setting up/upgrading a research management/administration unit within the coordinating institution would be beneficial. This will be achieved by fully utilising the experience and best practices of the internationally leading partners and is expected to be a concrete deliverable of the Twinning exercise.

In general, costs relating to administration, networking, coordination, training, management, travel costs are acceptable under a Twinning project. While the action does not focus on equipment and research costs, these could be accepted if they constitute only a minor part (up to 10%) of the total Horizon 2020 funding requested and are deemed necessary to fulfil the action's specific scope and objective.

Therefore, for grants awarded under this topic and type of action the following cost categories will be ineligible costs:

- infrastructure costs;

The respective option of Article 6.5.C of the Model Grant Agreement will be applied.

The duration of a Twinning project can be up to 3 years.

If the coordinating entity has already been funded (as a coordinator) under other Horizon 2020 Twinning calls, these projects need to be described in the proposal. In particular, proposers need to clearly demonstrate the added value and impact of the proposal in achieving the Twinning programme objectives, in comparison to the already funded Twinning project within the coordinating entity.

The Commission considers that proposals requesting a contribution from the EU of EUR 0.9 million, would allow this specific challenge to be addressed appropriately. Nonetheless, this does not preclude submission and selection of proposals requesting lower amounts.

Expected Impact:

- Increased research excellence of the coordinating institution in the particular field of research as a result of the twinning exercise.
- Enhancing the reputation, attractiveness and networking channels of the coordinating institution.
- Improved capability to compete successfully for national, EU and internationally competitive research funding.
- Illustrate quantitatively and qualitatively the expected potential impact of the twinning exercise within the coordinating institution (and possibly at regional/national level) based on indicators like expected future publications in peer reviewed journals, collaboration agreements with businesses, intellectual property, new innovative products or services.
- It should be explained how the leading scientific institutions in the partnership will contribute in terms of provision of access to new research avenues, creativity and the development of new approaches, as well as acting as a source for increased mobility (inwards and outwards) of qualified scientists.
- The benefits for the internationally leading scientific institutions and the way they would materialise through the partnership should be substantiated.

[1]Early stage researchers shall, at the time of recruitment by the host organisation, be in the first four years (full-time equivalent research experience) of their research careers and have not been awarded a doctoral degree. Full-time equivalent research experience is measured from the date when the researcher obtained the degree entitling him or her to embark on a doctorate, (either in the country in which the degree was obtained or in the country in which the researcher is recruited) even if a doctorate was never started or envisaged. Part-time research experience will be counted pro-rata.

Topic conditions and documents

1. Eligible countries: described in [Annex A](#) of the Work Programme.

A number of non-EU/non-Associated Countries that are not automatically eligible for funding have made specific provisions for making funding available for their participants in Horizon 2020 projects. See the information in the [Online Manual](#).

2. Eligibility and admissibility conditions: described in [Annex B](#) and [Annex C](#) of the Work Programme.

1. The applicant organisation (coordinator) where a defined field of research aims to be strengthened as a result of the Twinning action should be established in a Member State or Associated Country that is ranked below 70% of the EU27 average of the composite indicator on Research Excellence[[The detailed

scores of the composite indicator can be found in p. 5 (Excellence in S&T 2010) of the "Research and Innovation Performance in EU Member States and Associated Countries 2013" at http://ec.europa.eu/research/innovation-union/pdf/state-of-the-union/2012/innovation_union_progress_at_country_level_2013.pdf].

The selected corrective threshold of 70% of the EU average has been chosen in line with the particular policy requirements of the measure, to ensure the greatest possible impact through targeting only the lowest performing Member States, and thereby maximising the real value of these actions.

Based on the above threshold, applicant organisations from the following Member States and Associated Countries (subject to valid association agreements of third countries with Horizon 2020) will be eligible to submit proposals as coordinators (the "low R&I performing" or "Widening" countries):

Member States: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

Associated Countries: Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, North Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.

2. Twinning proposals must involve a minimum of three participants:

a. The applicant organisation must satisfy the condition set out in point 1 above, and must be the coordinator of the proposal.

b. At least two internationally-leading research intensive counterparts that must be coming from two different Member States or Associated Countries other than that of the coordinating applicant.

3. The requested EU contribution shall not exceed a maximum of EUR 0.9 million for a period of up to 3 years.

Proposal page limits and layout: please refer to Part B of the proposal template in the submission system below.

3. Evaluation:

- **Evaluation criteria, scoring and thresholds** are described in [Annex H](#) of the Work Programme.
- **Submission and evaluation processes** are described in the [Online Manual](#).

The specific policy requirements, scope and perspectives of this topic aim at spreading excellence and widening participation in Europe, in the different "low R&I performing" or "Widening" countries[[Member States: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

Associated Countries: Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, North Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.]]. Therefore, to serve the objectives of the programme and to better spread the impact of the action the following is set relating to *ex aequo* proposals:

For proposals with the same score, any further prioritisation will be based on the following factors applied in the following order:

-proposals with coordinators established in "low R&I performing" or "Widening" countries[[Member States: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

Associated Countries: Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, North Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.]] not otherwise covered by more highly-ranked proposals;

- approach as described in Annex H, paragraphs 3b to 3e;

This approach will be applied successively for every group of *ex aequo* proposals requiring prioritisation, starting with the highest scored group, and continuing in descending order.

4. Indicative time for evaluation and grant agreements:

Information on the outcome of evaluation (**single-stage** call): maximum 5 months from the deadline for submission.

Signature of grant agreements: maximum 8 months from the deadline for submission.

5. Proposal templates, evaluation forms and model grant agreements (MGA):

Coordination and Support Action:

[Specific provisions and funding rates](#)

[Standard proposal template](#)

[Standard evaluation form](#)

[General MGA - Multi-Beneficiary](#)

[Annotated Grant Agreement](#)

6. Additional provisions:

[Horizon 2020 budget flexibility](#)

[Classified information](#)

[Technology readiness levels \(TRL\)](#) – where a topic description refers to TRL, these definitions apply

For grants awarded under this topic for coordination and support actions the following cost categories will be ineligible costs:

- infrastructure costs

The respective option of Article 6.5(c) of the [Model Grant Agreement](#) will be applied.

7. Open access must be granted to all scientific publications resulting from Horizon 2020 actions.

Where relevant, proposals should also provide information on how the participants will manage the research data generated and/or collected during the project, such as details on what types of data the project will generate, whether and how this data will be exploited or made accessible for verification and re-use, and how it will be curated and preserved.

Open access to research data The Open Research Data Pilot has been extended to cover all Horizon 2020 topics for which the submission is opened on 26 July 2016 or later. Projects funded under this topic will therefore by default provide open access to the research data they generate, except if they decide to opt-out under the conditions described in [Annex L of the Work Programme](#). Projects can opt-out at any stage, that is both before and after the grant signature.

Note that the evaluation phase proposals will not be evaluated more favourably because they plan to open or share their data, and will not be penalised for opting out.

Open research data sharing applies to the data needed to validate the results presented in scientific publications. Additionally, projects can choose to make other data available open access and need to describe their approach in a Data Management Plan.

Projects need to create a Data Management Plan (DMP), except if they opt-out of making their research data open access. A first version of the DMP must be provided as an early deliverable within six months of the project and should be updated during the project as appropriate. The Commission already provides guidance documents, including a template for DMPs. See the [Online Manual](#).

Eligibility of costs: costs related to data management and data sharing are eligible for reimbursement during the project duration.

The legal requirements for projects participating in this pilot are in the article 29.3 of the [Model Grant Agreement](#).

8. Additional documents:

[1. Introduction WP 2018-20](#)

[15. Spreading excellence and widening participation WP 2018-20](#)

[18. Dissemination, Exploitation and Evaluation WP 2018-20](#)

[General annexes to the Work Programme 2018-2020](#)

[Legal basis: Horizon 2020 Regulation of Establishment](#)

[Legal basis: Horizon 2020 Rules for Participation](#)

[Legal basis: Horizon 2020 Specific Programme](#)

More at: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/widespread-05-2020;callCode=H2020-WIDESPREAD-2018-2020;freeTextSearchKeyword=;matchWholeText=true;typeCodes=1,2;statusCodes=31094501,31094502,31094503;programmePeriod=2014%20-%202020;programCcm2Id=31045243;programDivisionCode=31048019;focusAreaCode=null;geographicalZonesCode=null;programmeDivisionProspect=null;startDateLte=null;startDateGte=null;crossCuttingPriorityCode=null;cpvCode=null;performanceOfDelivery=null;sortQuery=sortStatus;orderBy=asc;onlyTenders=false;topicListKey=topicSearchTablePageState>



Annex 2.2.C CALL ERC-2020-STG for Mentimeter quiz

ERC STARTING GRANTS

ERC-2020-STG

Programme

Horizon 2020 Framework Programme

Work programme part

ERC-2020

Call

Call for proposals for ERC Starting Grant (ERC-2020-STG)

Work programme year

ERC-2020

Type of action

ERC-STG Starting Grant

Deadline model

single-stage

Opening date

17 July 2019

Deadline date

16 October 2019 17:00:00 Brussels time

Scope:Objectives

ERC Starting Grants are designed to support excellent Principal Investigators at the career stage at which they are starting their own independent research team or programme. Principal Investigators must demonstrate the ground-breaking nature, ambition and feasibility of their scientific proposal.

Size of ERC Starting Grants

Starting Grants may be awarded up to a maximum of EUR 1 500 000 for a period of 5 years (The maximum award is reduced pro rata temporis for projects of a shorter duration. This does not apply to ongoing projects).

However, up to an additional EUR 1 000 000 can be requested in the proposal to cover the following eligible costs when these are necessary to carry out the proposed work: (a) "start-up" costs for Principal Investigators moving to the EU or an Associated Country from elsewhere as a consequence of receiving the ERC grant and/or (b) the purchase of major equipment and/or (c) access to large facilities and/or (d) other major experimental and field work costs, excluding personnel costs.

Additional funding is not subject to pro rata temporis reduction for projects of shorter duration.

All funding requested is assessed during evaluation.

Profile of the ERC Starting Grant Principal Investigator

The Principal Investigator shall have been awarded their first PhD at least 2 and up to 7 years prior to 1 January 2020. The eligibility period can be extended beyond 7 years in certain properly documented circumstances.

A competitive Starting Grant Principal Investigator must have already shown the potential for research independence and evidence of maturity, for example by having produced at least one important publication as main author or without the participation of their PhD supervisor. Applicant Principal Investigators should also be able to demonstrate a promising track record of early achievements appropriate to their research field and career stage, including significant publications (as main author) in major international peer-reviewed multidisciplinary scientific journals, or in the leading international peer-reviewed journals of their respective field. They may also demonstrate a record of invited presentations in well-established international conferences, granted patents, awards, prizes, etc.

For further information please see the ERC Work Programme 2020.

Topic conditions and documents

List of countries and applicable rules for funding:

1. Eligible countries: The conditions specific to the ERC are described in the [ERC Work Programme 2020](#) under the heading Eligibility criteria and in Annex 3. An overview is provided below:

The ERC actions are open to **researchers of any nationality** who intend to conduct their research activity in any EU Member State or [Associated Country](#). **Principal Investigators** may be of **any age and nationality** and may reside in any country in the world at the time of the application. Principal Investigators funded through the ERC frontier research grants shall spend a minimum percentage of their working time on the ERC project and a minimum percentage of their working time in an EU Member State or Associated Country.

The **host institution** (Applicant Legal Institution) must either be established in an EU Member State or [Associated Country](#) as a legal entity created under national law, or it may be an International European Interest Organisation (such as CERN, EMBL, etc.), the European Commission's Joint Research Centre (JRC) or any other entity created under EU law.

2. Eligibility and admissibility conditions:

The conditions specific to ERC grants are described in the [ERC Work Programme 2020](#) under the heading Eligibility criteria and in the [ERC Rules for Submission and Evaluation](#) under Section 2.4. An overview is provided below:

Eligible proposals: All proposals must be complete and submitted by eligible Principal Investigators before the relevant call deadline. A complete proposal needs to include all parts or sections (see “Proposal submission and description” below). Incomplete proposals may be declared ineligible. The content of the proposal must relate to the objectives and to the grant type set out in the call, as defined in [ERC Work Programme 2020](#). A proposal will only be deemed ineligible on grounds of ‘scope’ in clear-cut cases.

Eligible Principal Investigator: Principal Investigators may be of any age and nationality and may reside in any country in the world at the time of the application. All Principal Investigators funded through an ERC Starting grant shall spend a minimum of **50% of their working time** in an EU Member State or Associated Country and a minimum of 50% of their working time on the ERC project.

Eligible Host Institution: The host institution (Applicant Legal Entity) must engage the Principal Investigator(s) for at least the duration of the project, as defined in the grant agreement. It must either be established in an EU Member State or [Associated Country](#) as a legal entity created under national law, or it may be an International European Interest Organisation (such as CERN, EMBL, etc.), the European Commission's Joint Research Centre (JRC) or any other entity created under EU law. Any type of legal entity, public or private, including universities, research organisations and undertakings can host Principal Investigators and their teams.

Restrictions on submission of proposals: The restrictions for submission are related to the outcome of the evaluation in previous calls and are designed to allow unsuccessful Principal Investigators the time necessary to develop a stronger proposal. For further details please consult page 20-21 of the [ERC Work Programme 2020](#) or the [Frequently Asked Questions](#).

Proposal page limits and layout: A complete proposal is composed of:

- **Administrative proposal forms** (including Ethics Review Table): available in section 5 of the topic conditions and in the submission tool below. To access the submission tool, you need to register to the [Funding & Tenders Portal](#) first.
- **Research Proposal (Parts B1 and B2)**, available in the submission tool below, should be uploaded and submitted via the submission tool as PDF files.

Proposal Part B1

- Extended Synopsis: max. 5 pages (references do not count towards the page limits)
- Curriculum Vitae: max. 2 pages
- Funding ID: no page limits
- Track Record: max. 2 pages

Proposal Part B2

Scientific Proposal: max. 15 pages (references do not count towards the page limit).

- **Host Institution Binding Statement of Support** (available on this page below and as a word-template in the submission tool)
- **PhD record** and supporting documents for eligibility checking.
- **Ethics review self-assessment** (if applicable) and supporting documentation.

Complete proposals must be submitted via the submission tool available through the [Funding & Tenders Portal](#). Further detailed guidance in the ['IT HOW TO'](#) wiki site.

3. Evaluation

The conditions specific to ERC are described in the [ERC Work Programme 2020](#) under the heading 'Evaluation procedure and criteria' and in the [ERC Rules for Submission and Evaluation](#). An overview is provided below:

Evaluation procedure

For the Starting grant call a single submission of the full proposal will be followed by a two-step evaluation. The evaluation will be conducted by means of a structure of high level peer review panels as listed in Annex 1 of the [ERC Work Programme 2020](#). The panels may be assisted by independent experts working remotely.

Evaluation criteria

For all ERC frontier research grants **scientific excellence is the sole criterion of evaluation**. It will be applied in conjunction to the evaluation of both: the ground-breaking nature, ambition and feasibility of the research project; and the intellectual capacity, creativity and commitment of the Principal Investigator. The detailed evaluation elements applying to the excellence of the research project and the Principal Investigator are set out in the [ERC Work Programme 2020](#).

4. Indicative timetable for evaluation and grant agreement:

Please refer to the [ERC Work Programme 2020](#) under the heading 'Indicative summary of main calls from the 2020 budget'.

5. Provisions, proposal templates and evaluation forms for the type(s) of action(s) under this topic: **ERC 2020 Starting Grant**

For the specific provisions and the funding rates, please refer to the [ERC Work Programme 2020](#).

- [Information for Applicants to the Starting and Consolidator Grant 2020 Calls](#)
- [ERC 2020 Standard templates](#)
- [ERC Guide for Peer Reviewers –STG, COG, ADG](#)
- [H2020 ERC MGA – Multi-Beneficiary](#)
- [H2020 ERC MGA – Mono-Beneficiary](#)
- [H2020 Annotated Grant Agreement](#)

6. Open access

The ERC supports the principle of open access to the published output of research, including in particular peer-reviewed articles and monographs, as a fundamental part of its mission. It also supports the basic principle of open access to research data and data related products such as computer code. The ERC considers that providing free online access to all these materials can be the most effective way of ensuring that the fruits of the research it funds can be accessed, read and used as the basis for further research.

Under Horizon 2020, beneficiaries of ERC grants must ensure open access to all peer-reviewed scientific publications relating to their results as set out in Article 29.2 of the ERC Model Grant Agreement.

In addition, beneficiaries of ERC frontier research grants funded under this Work Programme will automatically be covered by the provisions on research data sharing as set out in Article 29.3 of the ERC Model Grant Agreement unless they specifically decide to opt-out. In particular, beneficiaries that do not opt-out will be required to submit a data management plan within the first six months of project implementation. These provisions are designed to facilitate access, re-use and preservation of the research data generated during the ERC funded research work.

Beneficiaries should carefully check the additional obligations related to open research data contained in Article 29.3. They may opt-out of the provisions of the previous paragraph at any stage, thereby freeing themselves retroactively from the associated obligations.

7. Additional documents:

[Legal basis: Horizon 2020 - Regulation of Establishment](#)

[Legal basis: Horizon 2020 Rules for Participation](#)

[Legal basis: Horizon 2020 Specific Programme](#)

Additional documents

- Flash Call Info_STG2020 results [en](#)

More at: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/erc-2020-stg;callCode=ERC-2020-STG;freeTextSearchKeyword=;matchWholeText=true;typeCodes=1,2;statusCodes=31094501,31094502,31094503;programmePeriod=null;programCcm2Id=31045243;programDivisionCode=31047825;focusAreaCode=null;geographicalZonesCode=null;programmeDivisionProspect=null;startDateLte=null;startDateGte=null;crossCuttingPriorityCode=null;cpvCode=null;performanceOfDelivery=null;sortQuery=sortStatus;orderBy=asc;onlyTenders=false;topicListKey=topicSearchTablePageState>

Annex 2.2.D Mentimeter quiz for the lesson

| | |
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| What is the deadline for submission? | 16 October2019 |
| What is the maximum amount of the grant? | EUR 1 750000 + EUR 1000 000 can be requested |
| Is any own contribution needed or does it provide full financing? | Full financing |
| Can any equipment be procured? | Yes |
| How long is the project period? | 5 years |
| Does it require partnership? | No |
| Main purpose of the grant | support the career of leading researchers |
| “Principal Investigators funded through an ERC Starting grant shall spend a maximum of 50% of their working time in an EU Member State” | False |



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| <p>Teacher’s short presentation on: “project concept” and “expression of interest”: features, function. Homework should be uploaded to the given platform prior to the class. Teacher’s homework: prepare for providing feedback on the uploaded materials, especially the letter of invitation for next class.</p> <p>e) Quick end-of-lesson round-table feedback for the teacher - 5 minutes Which were the most interesting issues you learnt at this lesson?</p> | | |
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Further readings/reference material for teachers

- <https://www.umc.edu.dz/images/h2020%20BOOK.pdf>



Lesson 4 Preparation of a project proposal

Learning outcomes to be developed:

- The student is familiar with the general process and principles of evaluation and assessment criteria of research proposals: what do funding agencies prefer, what they dislike, vocabulary required, how to interpret what is required in a specific call, aspects meaning advantage in the context of EU funded calls
- The student can analyse a given European call for funding from the perspective of its underlying policy (need for the call) and proposal (goals, activities, and expected outcomes and impact).
- With the help of the teacher, the student can draft a simple budget for a proposal, according to the activities planned for the different project phases and milestones.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|---|------------------------------|
| <p>a) Short revision of the main points of the previous lesson (5 mins): revision of the main points.</p> <p>b) Visiting an online brokerage event (30 minutes)</p> <ul style="list-style-type: none"> • Teachers' brief introduction of this type of event, presentation of the functions provided by the concrete online interface to be visited • Guiding questions for the observation: "What are the similarities and differences between this event and the online database browsing? What added value of a brokerage event can you identify?" | <p>b) Guiding questions for the observation: "What are the similarities and</p> | <p>5 mins</p> <p>30 mins</p> |

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| <ul style="list-style-type: none"> • Signing in (with the teachers login) the event, collecting observations • Discussing the conclusions <p>b) Frontal presentation by the teacher (20 mins): The goal of the presentation is to provide the essential information regarding the formulation of work packages (how to formulate them; good and bad examples). The other part of the presentation touches upon the financial provisions: major cost categories, their basic characteristics, etc.</p> <p>c) PBL - Activities developing students' skills (40 mins):</p> <ul style="list-style-type: none"> • For this lesson, the students identify maximum 4 potential project partner institutions, provide the availabilities of the institutions and also explain the reasons why to involve that partner. In class, the final common decision on the partners in the frame of a negotiation process takes place (10 mins) • Introduction of the previous research conducted, developments of the research focus, research questions, brief rationale for the project idea (5 mins) • setting project work plan, and activities based on them (10 mins) <p>The activity will focus on how the work plan is built</p> <ul style="list-style-type: none"> • Work Packages, • tasks / activities; • deliverables / outputs, etc. • What roles partners can be dedicated, how you plan the activities (running in parallel or built on each other, etc.) <p>- drafting & negotiating on a simple budget (15 mins)</p> <p>Homework:</p> <ul style="list-style-type: none"> • finish the budget, phases and activities. | <p>differences between this event and the online database browsing? What added value of a brokerage event can you identify?" - students take individual notes on virtual whiteboard (save them individually)</p> | <p>20 mins</p> <p>40 mins</p> |
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Lesson 5 Institutional proposals, research strategy and governance

Learning outcomes to be developed:

- The student can differentiate external from internal drivers of research policy.
- The student is able to recognize the main components of a funding proposal and link them to the evaluation criteria of a given call for funding.
- The student can explain the main governance structure of a given research institution.
- The student can distinguish and discuss at which stage of policy and strategy development intervene pre-award and research policy/strategy related professions.
- The learner interiorizes and commits to the values and the mission of the institution.
- The student demonstrates curiosity and interest for systemic approaches and for the organization of the research ecosystem.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|---|---|--|
| <p>a. Short revision of the main points of the previous lesson (5 mins): Kahoot test (after registering, at Kahoot homepage, you can create easily games helping assessment here OR virtual whiteboard (linoit.com for example)</p> <p>b) Brainstorming: what kind of research performing institutions are there according to the students?</p> | <p><i>Results (scores) should be counted into the end of semester grade</i></p> | <p>5 mins</p> <p>10 mins</p> |

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| <p>The teacher can apply virtual whiteboard (i.e. linoit) as a platform for brainstorming; word cloud (i.e. mentimeter) can also be applied (5 min) + short summary of the lecturer on the results (5 mins)</p> | | |
| <p>b) Frontal presentation by the teacher (20-25 mins): The goal of the presentation covers information regarding the research institutions, their general description. Quality assessment can also be mentioned. The general introduction of the institutional proposal is covered.</p> | | <p>25 mins</p> |
| <p>c) Groups of 3 students can work on the followings: first, students divide the tasks among each other, and gather the necessary information (15 mins)</p> <ul style="list-style-type: none"> • find the values and missions of the University - prepare a short list of them • what kinds of research projects are there at the University (list 5-10 of them) • when elaborating an institutional proposal, on what areas RMA support can be detected? | | <p>20 mins</p> |
| <p>Students dealing with the same question come together, see what they found. Those working on question 3 prepare a mindmap together. They discuss the results in class. (15 mins)</p> | | <p>15 mins</p> |
| <p>d) Homework (10 mins): Short feedback on homework. Continuing the elaboration of the call for tender (according to the guidance of the teacher)</p> | | <p>10 mins</p> |
| <p>e) Quick end-of-lesson round-table feedback for the teacher - 5 minutes Which were the most interesting issues you learnt at this lesson?</p> | | <p>5 mins</p> |

Lesson 6 Conflict of interests between policy, funding and research

Learning outcomes to be developed:

- The student can identify examples of societal and economic drivers impacting and defining research policy (e.g. the COVID 19 situation).
- The student can understand and contextualise European research funding frameworks and main European funding programmes and schemes to support research and innovation activities (e.g. Horizon Europe).
- The student can discuss and formulate arguments and confront opinions in the context of real cases of scientific policies.
- The student can effectively communicate, negotiate terms and persuade different target audiences including policy makers for programme bodies, senior management of research institutions, research managers, and researchers.
- The learner interiorizes and commits to the values and the mission of the institution.
- The student demonstrates curiosity and interest for systemic approaches and for the organization of the research ecosystem.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|---|---|---------------|
| a. Short revision of the main points of the previous lesson (5 mins): Kahoot test (after registering, at Kahoot homepage, you can create easily games helping assessment here OR virtual whiteboard (linoit.com for example) | <i>Results (scores) should be counted into the end of</i> | 5 mins |

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| <p>b) PBL progress (25 mins): - The groups finish elaborating the call for tender.</p> <p>c) Work in pairs: each pair receives one of the articles. The pair of students answer the following questions based on the articles below (15 mins):</p> <ul style="list-style-type: none"> • Mountz, A., Bonds, A., Mansfield, B., Loyd, J., Hyndman, J., Walton-Roberts, M., Basu, R., Whitson, R., Hawkins, R., Hamilton, T., & Curran, W. (2015). For Slow Scholarship: A Feminist Politics of Resistance through Collective Action in the Neoliberal University. <i>ACME: An International Journal for Critical Geographies</i>, 14(4), 1235-1259. Retrieved from https://acme-journal.org/index.php/acme/article/view/1058 • Sandra Acker & Anne Wagner (2019) Feminist scholars working around the neoliberal university, <i>Gender and Education</i>, 31:1, 62-81, DOI: 10.1080/09540253.2017.1296117 • John Morrissey (2015) Regimes of performance: practices of the normalised self in the neoliberal university, <i>British Journal of Sociology of Education</i>, 36:4, 614-634, DOI: 10.1080/01425692.2013.838515 • Rhodes C, Wright C, Pullen A. Changing the World? The Politics of Activism and Impact in the Neoliberal University. <i>Organization</i>. 2018;25(1):139-147. doi:10.1177/1350508417726546 • Rebecca Lund (2020) The social organisation of boasting in the neoliberal university, <i>Gender and Education</i>, 32:4, 466-485, DOI: 10.1080/09540253.2018.1482412 • Rebecca Lund, & Tienari, J. (2019). Passion, care, and eros in the gendered neoliberal university. <i>Organization</i>, 26(1), 98-121.(23p). • Edwards, M. A., & Roy, S. (2017). Academic Research in the 21st Century: Maintaining Scientific Integrity in a Climate of Perverse Incentives and Hypercompetition. <i>Environmental Engineering Science</i>, 34(1), 51–61. https://doi.org/10.1089/ees.2016.0223 • Laudel, G. (2006). The art of getting funded: how scientists adapt to their funding conditions. <i>Science and Public Policy</i>, 33(7), 489–504. https://doi.org/10.3152/147154306781778777 <p>1. Which funding changes have occurred in the last decades? 2. What other factors have changed in the last decades that seem to affect the way research is conducted? 3. What are the micromechanisms by which researchers adapt to the current pressures of the research environment?</p> | <p><i>semester grade</i></p> | <p>15 mins</p> <p>45 mins</p> <p>10 mins</p> <p>5 mins</p> |
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| <p>4. Which behaviours related to the way researchers conduct their research have been observed?</p> <p>5. Which ethical dilemmas are raised in the articles?</p> <p>6. If you were a Researcher/Funding Agency/Policy maker/ RMA, you abide by which values? Consider the values of the citizen, the researcher and those of the institution.</p> <p>7. What course of action would you consider for the future?</p> <p>Then, the groups working on the same article form a larger group, discuss their findings (10 mins) then the answers are discussed in class (20 mins).</p> <p>Homework (10 mins):</p> <ul style="list-style-type: none"> • The groups have to prepare a presentation for the last lesson – aim is to introduce the project, and convince the potential stakeholders / institutional decision makers. • studying the application of another group • taking notes individually for the evaluation on the base of pre-defined evaluation criteria <p>d) Quick end-of-lesson round-table feedback for the teacher - 5 minutes Which were the most interesting issues you learnt at this lesson?</p> | | |
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Lesson 7 Oral presentations

Learning outcomes to be developed:

- The student can understand and contextualise European research funding frameworks and main European funding programmes and schemes to support research and innovation activities (e.g. Horizon Europe).
- The student is familiar with the general process and principles of evaluation and assessment criteria of research proposals: what do funding agencies prefer, what they dislike, vocabulary required, how to interpret what is required in a specific call, aspects meaning advantage in the context of EU funded calls
- The student can analyse a given European call for funding from the perspective of its underlying policy (need for the call) and proposal (goals, activities, and expected outcomes and impact).
- The student is able to recognize the main components of a funding proposal and link them to the evaluation criteria of a given call for funding.
- The student is able to draft a funding plan (a) in line with the institutional strategy of the organisation (b) that addresses external and internal drivers of policy and strategy, c) adjusted with the specific evaluation and assessment criteria, preferences of research calls (of the funding organisations).
- The student can discuss and formulate arguments and confront opinions in the context of real cases of scientific policies.
- The student can effectively communicate, negotiate terms and persuade different target audiences including policy makers for programme bodies, senior management of research institutions, research managers, and researchers.
- The student is able to accept others' views, and work together to provide the necessary support for the proposal's preparation.
- The student is critical regarding his own work and that of others taking on a constructive attitude.
- The student takes responsibility for its own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

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| <p>Teaching ideas: Methods, tools, illustration, problem, game etc.</p> | <p>Evaluation and</p> | <p>Timing</p> |
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Module 3 - Project Integration and Management

Lesson 1: Project Lifecycle & RMAs as Professionals in the Project lifecycle

Learning outcomes to be developed:

- The student knows how to identify the activities in the light of the project objectives, outputs, main tasks, performance criteria and resource requirements set in the proposal.
- The student will identify the RMA professional roles involved directly and indirectly in post award project management

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|---|---|--|
| <p>a) Games helping students to be connected: getting acquainted with each other (10-15 minutes) <i>15 minutes</i></p> <ul style="list-style-type: none"> • “Show and tell” see here • OR: “Snowball fight” - see here. • OR see further ideas here | | 15 mins |
| <p>b) Evaluation of prior knowledge and competences - 10 minutes</p> <p>Exploring the initial competences, knowledge of students: Answers to short, basic questions by either of the followings</p> <ul style="list-style-type: none"> • Kahoot test (after registering, at Kahoot homepage, you can create easily games helping assessment here • or interactive word cloud (https://www.mentimeter.com/) • OR virtual whiteboard (linoit.com for example) <p>Closed by teacher’s feedback and oral summary</p> | <i>Results (scores) should not be counted into the end of semester grade</i> | 10 mins |
| <p>c) Introduction to the RMA carrier by the help of an invited RMA</p> <ul style="list-style-type: none"> • on the request of the teacher, the RMA shares experiences on the different leadership styles applied in the different stages of a | | 30 mins <i>10 minutes of self-introduction</i> |

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| <p>project life cycle and refers to the theoretical content discussed later on, in the lesson</p> <ul style="list-style-type: none"> • Interview questions to be sent to the RMA in advance: <ul style="list-style-type: none"> ○ What are the best ways to find out who are the right persons to ask a question within the organization: giving advice, situation exercise, studies on the topic? (Understanding nonverbal messages and unwritten rules within a workplace.) • optionally, this conversation can be done via Internet as well <p><u>Unit 2 of the lesson: Setting the goals and rules for the course, together with the students</u></p> <p>1. Introduction of the course (expectations, planned activities, assessment methods) and the topic of the lesson by the teacher - <i>10 mins</i></p> <p>2. Activities helping the understanding of theoretical foundation related to the leadership model set by Morgeson et al (2010) https://msu.edu/~morgeson/morgeson_derue_karam_2010.pdf</p> <ul style="list-style-type: none"> • classroom group work: <ul style="list-style-type: none"> ○ Each student receives one of the functions listed in the article on a piece of paper (see in the curriculum) <p>Leadership functions during the transition phase:</p> <ol style="list-style-type: none"> 1. Compose the team – bringing together the best available people for the job, taking into account complementary competences and ability to work together for a common goal 2. Define the mission – clarifying the team purpose 3. Establish performance expectations and set team goals – goals which are appropriately challenging and motivating 4. Structure and plan – dividing out tasks and responsibilities, scheduling and so on 5. Train and develop team members – including through coaching by the leader 6. Sense-making — defined as “identifying essential environmental events, interpreting these events given the team’s performance situation, and communicating this interpretation to the team” | | <p>+ 20 minutes of Q&A</p> <p>10 mins</p> <p>10 mins</p> |
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| <p>7. Providing feedback – both to individuals and to the team collectively</p> <p>Leadership functions during the action:</p> <ol style="list-style-type: none"> 1. Monitor the team – “examining the team’s processes, performance, and the external team context” 2. Manage team boundaries – “representing the team’s interests to individuals and groups outside the team in order to protect the team from interference as well as persuading others to support them” and co-ordinating activities with other teams 3. Challenge the team – its performance, assumptions and ways of working 4. Perform team tasks – “participating in, intervening in, or otherwise performing some of the team’s task work” 5. Solve problems – diagnosing and resolving issues that prevent performance 6. Provide resources – for example, information, equipment, finance and people 7. Encourage team self-management – empowerment, accountability and responsibility 8. Support the team social climate – encouraging positive and supportive behaviours between team members <ul style="list-style-type: none"> ○ On the whiteboard, the two phases are indicated and they are explained as well (either by arrows, or timeline) ○ The task of the students is to find the proper phase for the function they receive first. ○ When the two (7 and 8 members) groups of students are formed, then they have to decide the right sequence of the functions and put their paper to the board. ○ The teacher takes a photo of the whiteboard with the two phases and 15 functions, and uploads it to the site of the seminar. | | <p style="text-align: right;">15 mins</p> |
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3. Activity transforming the theoretical knowledge into personal experience:

The teacher presents the students the fact that the aim of this course will be to gain practical experiences in all possible ways on the theories/knowledge that they learn in this course. A possible way to introduce this:

“The theories presented above will be applied for ourselves as a team, as this situation is very similar to a workplace. In this case all of you will have to test yourself as leaders (using the Storyline method) but me as a teacher will have the overall responsibility for the effectiveness of our team and your satisfaction and development as my team members. This is an excellent occasion to set our expectations and our resolutions/decisions in terms of this course.

- *Your task is now to think about the function you received earlier and formulate a sentence answering the question:*
 - *Group A (Leadership functions during the transition phase): “Have you experienced “your” function in any form, during this lesson? (E. g.: setting goals: the teacher presented the goals of the course)*
 - *Group B (Leadership functions during the action): “What are your expectations towards me in terms of the function you received in the previous exercise?, how can I enhance your development on that area” (E. g.: “Provide resources”= I will give you the necessary information regarding good examples/literature/various types of information helping you to better understand the content of the lesson)*
- **Conversation aiming at the definition of the rules for the course including both students’ and teacher’s obligations (in the form of a written document to be available on the common (Moodle?) interface of the course)**

Lesson 2: Project Management Structure (PMS), Grant Agreement (GA) and Consortium Agreement (CA)

Learning outcomes to be developed:

- The student will map the main internal and external actors' involvement across the project management stages and devise a strategy for their timely contribution for the implementation of the project (i.e. Stakeholder Management)
- The student can follow the development of several simultaneous management tasks (eg. team management, cost management) and prioritize the most relevant ones at different stages of project management

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|---|---------------------------|-------------------------------|
| <p>a) Introduction of the lesson by the teacher - main aims, topics (project life cycle, possible roles - see figure 3; grant and consortium agreement, etc.)</p> <p>b) Group work: New content with “expert jigsaw” method describing the main parts of the Project Management Plan (PMP). Description for Expert jigsaw method is available in this document)</p> <ul style="list-style-type: none"> • students form groups of 5 • each student of the jigsaw groups get and study a different 1-2 pages long document including an example (see examples for project management plans in Annex 3.3.E: https://www.dropbox.com/sh/c5nzdf1mkpxntmi/AAB306rAu0mldjNNPGy9tWSna?dl=0) such as: <ul style="list-style-type: none"> ▪ schedule management plan; ▪ costs management plan; ▪ quality management plan; ▪ risk management plan. <p>b. the general description of the given plan (see Annexes 3.2.A, 3.2.B and 3.2.C), and a template for it (see them in Annex 3. 2. F)</p> | | <p>15 mins</p> <p>40 mins</p> |

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| <ul style="list-style-type: none"> • Groups of students have to answer the following questions in writing (in online learning, it is recommended to use a common online interface as e. g. a shared Google Drive document): What is the aim of this plan? How is it used in the course of the project? Who is responsible for its implementation in the course of the project? • students move to expert groups and discuss their answers, and prepare a scheme for the presentation of the given plan. (10 mins) • they go back to their jigsaw group. The members of the jigsaw group present the others the features of the different parts of the project management plan: aims, content, function of the given plan type. (10 mins) • Feedback and summary in the form of a guided conversation led by the teacher. (10 mins) <p><i>Guiding instructions for the teacher to moderate the conversation:</i></p> <ul style="list-style-type: none"> • <i>Ask the students: Now I am first interested in the opinion of those who did not receive the given plan, so please do not answer if you were working with it.</i> • <i>Do not allow the students to answer the question immediately, ask them to lift up their hands instead if they have an idea. Depending on the difficulty level of the question, wait for 10-20 minutes until more of them indicate that they have an answer - this will enhance students' activity.</i> <p>Questions:</p> <ol style="list-style-type: none"> 1. What can be the purpose of the requirement management/scope management plan? 2. Why is it important to compile a stakeholder management plan? What can be its purpose within a project? 3. Who can be responsible for the elaboration of the given plan? Who participates in the work (which department for example)? 4. In case there is a reschedule in the given plan, which other plans have to be revised? (Or an example of an unforeseen event can be provided, and the class can brainstorm on its impact on the different plans. Examples: a) a multiplier | | <p>10 mins</p> <p>10 mins</p> <p>15 mins</p> |
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| <p>event is not feasible, due to pandemia b) the principal investigator quit his current job and the project as well c) the price of event organization/staff costs prove to be much higher than planned, due to the major changes in the institutional regulations d) one of the partners does not complete the task undertaken, thus the partnership cannot continue the work according to the work plan e))</p> <p>5. What do you assume to be the most important type of plan, affecting the most aspects of the project implementation?</p> <p>c) First PBL task in the classroom - combined classroom and group work: The teams receive and study the text of a submitted proposal (all of the teams receive the same text, the teacher can select one of the texts included in Annex 3.2.D)</p> <p><u>Classroom work:</u></p> <ul style="list-style-type: none"> • Formation of groups of 4 students, • presentation of the project proposal by the teacher • Explanation of the Storyline method and the next task. <p><u>Group work:</u></p> <ul style="list-style-type: none"> • Students read the document presenting the different characters (See in Annex 3.2.G) • each of them chooses one, on the base of a group discussion • they complete the profiles • Info on the Storyline rules: think about choosing a fictive identity/avatar <p><u>Classroom work:</u></p> <ul style="list-style-type: none"> • Explanation of the responsibilities of <ul style="list-style-type: none"> ○ the (fictive) project coordination team within the consortium, ○ within the organisation (University as environment). For example, in case of a university, one can refer to the project management office at the institution, and the framework given by the official procedures. ○ the roles and responsibilities within a project coordination team such as responsible for ‘professional’, ‘finances’, | | 10 mins |
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| <p>‘communication’, ‘leader’ (resp. for coordination / management) ‘expert’</p> <p><u>Group work:</u></p> <ul style="list-style-type: none"> • Choosing a leader • Discussing the following questions with the moderation of the leader: Which role would you like to fulfil in the project coordination team (PCT)? Groups make decision on the roles assigned to each student within the small group, i. e. the “project coordination team” by the help of the following table: | | |
| | <p>Select one from these:</p> <ul style="list-style-type: none"> - professional - finances - communication - leader (resp. for coordination / management) expert | <p>The competences that enable you (i. e. your avatar) for the given roles</p> |
| choice #1 | | |
| choice #2 | | |
| <ul style="list-style-type: none"> • The teams compare their tables and decide together on the functions. If more students would like to be the leader, the teacher helps the group to decide. If more students would like to fulfil or avoid a certain function, the team leader appoints/convince the students for the given function. • The teacher explains the homework (to prepare 1 or 2 plan/student) according to their role within the team | | |

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| <ul style="list-style-type: none"> • The teacher gives guidance for the team leaders to set a doodle voting for a team meeting (team members plus teacher included) during the following week <p>Homework:</p> <p>Individual assignment: in every group, student responsible for</p> <ul style="list-style-type: none"> • communication elaborates the communication management plan and identifies potential stakeholders • finances, starts to elaborate (and collect his questions on) resources management plan • professional issues, elaborates the quality management plan; • coordination and leadership, starts to elaborate the schedule management plan • team members & teacher send their doodle vote until the end of the given day • team leader <ul style="list-style-type: none"> ○ prepares an agenda and send to the members who can complete it ○ appoints a group member to write notes ○ after the meeting, sends out the reminder to the team members and the teacher <p>Tasks for the meeting</p> <ul style="list-style-type: none"> • As part of the project management plan, start elaborating the project scope management plan summarizing the work breakdown structure (WBS) on the base of a given Gantt chart and the project proposal (stages, outputs, partners) (table to be filled out should be included); <ul style="list-style-type: none"> ○ defining concrete assignments related to the plans • the teacher provides the teams with a short article summarizing the main advices on how to run an effective meeting (https://hr.vanderbilt.edu/training/effectivemtgs.php) | | |
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Annex 3. 2. A: Schedule management plan

Plan defining the criteria and the activities for developing, monitoring, and controlling the project schedule.

Part 1: Individual task

Based on the definition, and on the text of the Simpatico project, fill out the following table.

The Management Plan of the Simpatico project can be accessed here: https://drive.google.com/file/d/1_PNUMSKhBVr7j_AzuF70r_o7QF1H6-Oi/view?usp=sharing

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| What is the aim of this plan? | |
| How is it used in the course of the project? What is the function of it? | |
| Who is responsible for its implementation in the course of the project in the project team? | |

Part 2: Expert team

Within the expert team, the members discuss their answers and prepare a scheme for the presentation of the given plan.

Part 3: Jigsaw group

Within the jigsaw group, the members present each other the given plan they worked on in the expert group. The other group members take notes, since in the plenary session they might be the ones answering the question regarding the given plan.

Annex 3.2. B - Risk management plan

Plan where is defined how to conduct risk management activities for a project, how they will be structured and performed.

This plan includes the following components:

- Risk strategy - Describes the general approach on how the project risks will be managed;
- Methodology - Defines the specific approaches, tools, and data sources that will be used to perform risk management on the project;
- Roles and responsibilities - Defines the lead, support, and risk management team members for each type of activity described in the risk management plan, and establishes their respective responsibilities;

Timing - Defines when and how often the Project Risk Management processes will be performed during the project, in accordance with the project schedule;

Part 1.: Individual task

Based on the definition, and on the text of the Simpatico project, fill out the following table.

The Management Plan of the Simpatico project can be accessed here:

https://drive.google.com/file/d/1_PNUMSKhBVr7j_AzuF70r_o7QF1H6-Oi/view?usp=sharing

| | |
|---|--|
| What is the aim of this plan? | |
| How is it used in the course of the project? | |
| Who is responsible for its implementation in the course of the project? | |

Part 2: Expert team

Within the expert team, the members discuss their answers and prepare a scheme for the presentation of the given plan.

Part 3: Jigsaw group

Within the jigsaw group, the members present each other the given plan they worked on in the expert group. The other group members take notes, since in the plenary session they might be the ones answering the question regarding the given plan.



Annex 3. 2. C - Cost management plan

Plan where is defined how the project costs will be estimated, budgeted, managed, monitored, and controlled.

Part 1: Individual task

Based on the definition, and on the text of the Simpatico project, fill out the following table.

The Management Plan of the Simpatico project can be accessed here:

https://drive.google.com/file/d/1_PNUMSKhBVr7j_AzuF70r_o7QF1H6-Oi/view?usp=sharing

| | |
|---|--|
| What is the aim of this plan? | |
| How is it used in the course of the project? | |
| Who is responsible for its implementation in the course of the project? | |

Part 2: Expert team

Within the expert team, the members discuss their answers and prepare a scheme for the presentation of the given plan.

Part 3: Jigsaw group

Within the jigsaw group, the members present each other the given plan they worked on in the expert group. The other group members take notes, since in the plenary session they might be the ones answering the question regarding the given plan.



OR



| | |
|---|--|
| Name | Rebecca/Fred (OR you can use another name) |
| Age | 28 |
| Ambitions/passions Feel free to complete! | is an amateur artist Is considering to start an own firm |
| Challenges/facts related to life circumstances Feel free to complete! | very good acquaintances and financial background, expensive hobbies |
| General personality traits Feel free to complete! | extroverted |
| Strengths | Friendly Creative Risk-taking Flexible Optimistic Ambitious Cooperative Attentive |
| Weaknesses | Less reliable bad in time management Self-confident Gossiper copes badly with boring tasks |
| You can add other traits: | |

3. The bossy



OR



| | |
|---|---|
| Name | Julia/Randy |
| Age | 42 |
| Ambitions / passion | had a sport career earlier, is still actively sporting |
| challenges / facts related with life circum- stances | single, has almost no private life, her/his passion is mostly his/her workplace |
| General personality traits | extroverted |
| Strengths | <ul style="list-style-type: none"> Hardworking Proactive Fast Optimistic ambitious Good organiser Precise Assertive |
| Weaknesses | <ul style="list-style-type: none"> Workaholic Impulsive bad at handling stress Impatient Talks too much Prones to be autochtratic |
| You can add other traits: | |

4. The Pessimistic



OR



| | |
|---|--|
| Name | Margaret/Greg (OR you can use another name) |
| Age | 50-60 |
| Ambitions/passions Feel free to complete! | |
| Challenges/facts related to life circumstances Feel free to complete! | Copes with health problems |
| General personality traits Feel free to complete! | introverted |
| Strengths | <ul style="list-style-type: none"> very devoted Dogmatic/pragmatic Has good diplomatic skills Very experienced High level of professional skills High performance Good organiser Precise Perfectionist Can work under pressure |
| Weaknesses Feel free to complete! | <ul style="list-style-type: none"> Not so friendly / cooperative with his/her colleagues Passive Lack of flexibility |
| You can add other traits: | |

Annex 3. 2. H Project Management Plan components

| Plan | Description |
|------------------------------|--|
| Scope Management Plan | <p>Plan where is described how the scope framework of the project will be defined, developed, monitored, controlled, and validated.</p> <p>This plan includes the following components:</p> <ul style="list-style-type: none"> ● Process for preparing a project scope statement; ● Process that enables the creation of the WBS from the detailed project scope statement; ● Process that establishes how the scope baseline will be approved and maintained; and ● Process that specifies how formal acceptance of the completed project deliverables will be obtained. |
| Requirements management plan | <p>Plan where is described how the project requirements will be analysed, documented, and managed.</p> <p>This plan includes the following components:</p> <ul style="list-style-type: none"> ● How requirements activities will be planned, tracked, and reported; ● Configuration management activities such as: how changes will be initiated; how impacts will be analysed; how they will be traced, tracked, and reported; as well as the authorization levels required to approve these changes; ● Requirements prioritization process; ● Metrics that will be used and the rationale for using them; and ● Traceability structure that reflects the requirement attributes captured on the traceability matrix. |
| Schedule management plan | <p>Plan where is defined the roadmap for how the project will be executed, the criteria and the activities for developing, monitoring, and controlling the project schedule.</p> |
| Resources management plan | <p>Plan where is detailed the information regarding the rates (personnel and other resources), estimation of travel costs, and other foreseen costs that are necessary to estimate the overall project budget, providing guidance on how project resources should be categorized, allocated, managed, and released.</p> <p>This plan includes the following components:</p> <ul style="list-style-type: none"> ● Identification of resources - Methods for identifying and quantifying team and physical resources needed; ● Acquiring resources - Guidance on how to acquire team and physical resources for the project; ● Roles and responsibilities – The function assumed by, or designated to a team member; The rights to apply project resources, make decisions, sign approvals, accept deliverables; ● Project team resource management - Guidance on how project team resources should be defined, staffed, managed, and eventually released; ● Training - Training strategies for team members; |

| | |
|-------------------------------|--|
| | <ul style="list-style-type: none"> • Team development - Methods for developing the project team; • Resource control - Methods for ensuring adequate physical resources are available as needed and that the acquisition of physical resources is adapted to the project needs. |
| Costs management plan | <p>Plan where is defined how the project costs will be estimated, budgeted, managed, monitored, and controlled.</p> <p>It's defined also the money transference between partners.</p> |
| Communication management plan | <p>Plan where it is described how project communications will be planned, structured, implemented, and monitored to ensure their effectiveness. It could also defined specific communications technologies that are required in the project.</p> |
| Quality management plan | <p>Plan where is identified the quality requirements and/or standards for the project and its deliverables, and documenting how the project will demonstrate compliance with quality requirements and/ or standards.</p> |
| Risk management plan | <p>Plan where is defined how to conduct risk management activities for a project, how they will be structured and performed.</p> <p>This plan includes the following components:</p> <ul style="list-style-type: none"> • Risk strategy - Describes the general approach on how the project risks will be managed; • Methodology - Defines the specific approaches, tools, and data sources that will be used to perform risk management on the project; • Roles and responsibilities - Defines the lead, support, and risk management team members for each type of activity described in the risk management plan, and establishes their respective responsibilities; • Timing - Defines when and how often the Project Risk Management processes will be performed during the project, in accordance with the project schedule; |
| Procurement management plan | <p>Plan where is defined the activities to be undertaken during the procurement (purchasing) process.</p> |
| Stakeholder management plan | <p>Plan where is defined and documented the approaches and actions that will increase support and minimize the negative impacts of stakeholders throughout the project development. In this plan it should also be identified the key stakeholders along with the level of power and influence they may have on the project.</p> |

Lesson 3: Project management integration, Monitoring and Control

Learning outcomes to be developed:

- The student has a basic insight into some main time and project management tools and methodologies.
- The student will be able to identify and measure the resources needed for project implementation (team and their time allocation, the physical and infrastructural resources needed, plus other needs) and to integrate this information with a budget and a calendar plan (i.e. Project Management Plan).
- The student will apply methodologies and tools for effective project management, including time, people and tasks management, as well as reporting.
- The student will be able to contribute to the identification and prioritization of the management, financial and legal issues to be addressed at different stages of the project life cycle (i.e. Project Integration Management).

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|--|---------------------------|--|
| <p>a) Feedback (10 mins) on the homework</p> <p>b) Frontal presentation of the teacher (30 mins):</p> <ul style="list-style-type: none"> • briefing on financial management issues; • Demonstration of an online PM tool such as e. g. Asana, Monday, Redmine, Todoist, Notion etc see more here - teacher makes the voice in advance according to his/her preferences https://project-management.com/top-10-project-management-software/ • grounding the next activity (organizing a kick.off meeting): presentation of the main parts, goals, features of a kick-off meeting in 5 minutes <p>d) PBL task:</p> | | <p>10 mins</p> <p>30 mins</p> <p>15 mins</p> |

- Storyline new event: Letter received from the head of unit (See Annex 3. 3. A below)
- starting the organization of a kick-off meeting, the leader discusses with the members of the project team the tasks and the responsibilities
- Time management - with the help of a PM tool indicates the WBS.
- they finalize the agenda of the kick-off meeting - send it with an official letter to the teacher
- feedback on the agendas, discuss the role of RMA in the preparation and execution of the kick-off meeting.

f) Exit ticket- 5 minutes

With the help of Socrative, or other platforms, students fill out the exit ticket. Possible questions:

- How well did you understand today's material?
- What did you learn from today's material?
- Answer the teacher's question (for example: mention those topics that need further clarification).

ge) Explanation of the individual homework: (PBL)

- Optional task for extra points: Make crib notes for yourself helping to remember the main financial terms

| term | features | example |
|------|----------|---------|
| | | |
| ... | | |
| ... | | |
| ... | | |
| ... | | |
| ... | | |

20 mins

5 mins



| | | |
|---|--|--------|
| <ul style="list-style-type: none"> • Suggestions for the detailed budget (amount of grant, goals) for their project and instructions using the key terms of the Lesson’s text on financial issues (e. g. flat rate, direct costs, eligibility etc.) with justification • Instruction for the students: keep in mind the interest of your avatar and try to assign the most preferable and still justifiable amounts to the activities related to your area • prepare with arguments for the next lesson where the budget will be discussed in the form of a team negotiation process | | 5 mins |
|---|--|--------|

Further reading for the teacher on the stages of group development:

<https://hr.mit.edu/learning-topics/teams/articles/stages-development>;
<https://hr.mit.edu/learning-topics/teams/articles/models>)



Annex 3. 3. A – E-mail from the Head of Unit

Dear Colleagues,

The leader of your team from today is [...].

You have 2 tasks to do within 20 minutes:

- Please, on the base of the profiles, finalize the table below indicating the roles and the names.
- In 20 minutes, we will have a meeting where we will discuss the communication issues of the TELLME project. Yesterday the project groups were formed and received the project application. The deadline is approaching to prepare the communication, the dissemination and the exploitation plans. In order to do that, the task of the group is

- to identify the possible stakeholders and audiences of the TELLME project,

- assign the different stakeholders, target audiences to the different plans

| | Target groups | Platforms |
|----------------------|---------------|-----------|
| Communication | | |
| Dissemination | | |
| Exploitation | | |

Please use now the shortened version of the TELLME_excerpts.doc.

<https://docs.google.com/document/d/1Jh6vWUwzsFKh5PCHXj0jrP150H5nHGLR/edit>

The team, with the direction of the leader of the team, has to divide the task among the members - you have to report about your ideas in 20 minutes!

Best,

Head of Unit

Lesson 4: Project management integration, Monitoring and Control

Learning outcomes to be developed:

- The student has a basic insight into some main time and project management tools and methodologies.
- The student will be able to identify and measure the resources needed for project implementation (team and their time allocation, the physical and infrastructural resources needed, plus other needs) and to integrate this information with a budget and a calendar plan (i.e. Project Management Plan).
- The student will apply methodologies and tools for effective project management, including time, people and tasks management, as well as reporting.
- The student will be able to contribute to the identification and prioritization of the management, financial and legal issues to be addressed at different stages of the project life cycle (i.e. Project Integration Management).

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| | | |
|--|---|----------------------|
| <p>Teaching ideas: Methods, tools, illustration, problem, game etc.</p> | <p>Evaluation and assessment</p> | <p>Timing</p> |
|--|---|----------------------|

| | | |
|--|--|---------|
| <p>a. Short revision of the main points of the first lesson (10 mins): the teacher prepares a crossword including 8-10 words in connection with the financial management of the project with the help of crossword labs. The students fill out the crossword individually (5 mins). They discuss the results. (5 mins)</p> | | 10 mins |
| <p>b) frontal presentation of the teacher - financial monitoring and the role of RMA (the question of compulsory supportive documents - give examples for all of them); project reporting - role of RMA; communication (Closing this session, the students could talk about their style on the first team meeting.)</p> | | 15 mins |
| <p>c) PBL task: Storyline event: the team leader so far gets new duties within the organization which do not make possible for him/her to fulfil this role - the team has to decide on the person of a new leader. The groups have to find out a new “Storyline” event generating situation where conflict management and assertivity has to be applied: preferably in connection with the definition of the details of the budget: contracts, procurement etc. - identifying the different costs arising in the different work packages of the project. The groups have to fill out a given excel table.</p> | | 30 mins |

| | | |
|--|--|--------|
| <p>description or an example (short situation illustrating the given conflict management type). <i>The handouts are being developed</i></p> <ul style="list-style-type: none"> As all groups receive the same example for conflict situations, each group demonstrates the given conflict management way (2 students) and the 3rd provides an explanation: what is its name, advantages ,disadvantages, in what kind of situation is it useful? Each group presents their way of solving the conflict situation, the others evaluate and analyse the small situation practices. <p>→ Reflecting on their own behaviour → Re-playing or discussing the behaviours observed in the situations faced in the first half of the lesson with different attitudes/solutions</p> <p>Explanation of the homework: a project partner indicates that it would not be able to fully perform its tasks.</p> <ul style="list-style-type: none"> How would the groups deal with the situation? Formal letter to the consortium, compromise on the situation, re-arrangement of the timing (Gantt as well if necessary), re-allocation of costs (letter to the national agency?) <p>optional tasks for extra points:</p> <ul style="list-style-type: none"> make a 1-page crib note of the major terms on the lesson. write an essay of min. 400 words on reflections to their own conflict management strategies applied so far | | 5 mins |
|--|--|--------|

Resources for activities described in e):

- table

<https://www.uscg.mil/Portals/0/seniorleadership/chaplain/5%20types%20of%20Conflict%20Styles%20Questionnaire.pdf?ver=2020-01-16-150312-330>

- background material

https://kilmanndiagnostics.com/wp-content/uploads/2018/03/TKI_Sample_Report.pdf

- evaluation

http://www.mordirections.com/uploads/1/0/2/2/10225537/thomas_kilman_conflict_mode_instrument.pdf



Lesson 5: Quality and Risk Management

Learning outcomes to be developed:

- The student is aware of the concept and methodology of risk management
- The student can effectively define and articulate, brainstorm and select the most adequate management solutions and evaluate its effects in achieving the project's goals

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|--|---|--|
| <p>a) Short feedback (10 mins) on the homework Short quiz on the theoretical framework/concepts of lesson 4 (5 mins) by Kahoot or Moodle (according to the teacher's preferences)</p> <p>b) Presentation by the teacher: main aspects of quality management</p> <p>c) Brainstorming (by virtual whiteboard) on positive and negative risks Summary of the outcome of the brainstorming by the teacher; short introduction to the next topic.</p> <p>d) PBL task:</p> <ul style="list-style-type: none"> • draw a risk assessment chart, identify the risks and their probability and then articulate contingency plans • prepare a risk management table. • present the chart and table in class • feedback on the presentations. | <p>individual work, evaluating the comprehension of the terms used in Lesson 4 (classroom test)</p> | <p>15 mins</p> <p>10 mins</p> <p>5 mins</p> <p>25 mins</p> |

| <p>f) PBL activity: Stages of team Development (Sources: Mindtools or MIT website article)</p> <ul style="list-style-type: none"> based on the model of Tuckman discussed in Lesson 1, the students will be assigned two types of tasks: one individual and one group task <ul style="list-style-type: none"> First, each student receives a table with the 5 phases of the model, and (s)he has to fill out the first column of it, based on his/her opinion, in which one the group is (with reasoning), which one it passed. Then, the PBL group gets together and discusses the individual results. The groups give a briefing on their findings. | | 25 mins | | | | | | |
|---|-------------------------------------|-------------------------------------|--|----------|--|----|--|--------|
| <p>e) PBL activity: <u>Individual work:</u></p> <ul style="list-style-type: none"> Students read and study the model of Belbin's 9 team roles (1970) (a one page long text summarizing the 9 main types of group roles). See also the ppt in Annex 3.5.1. Reflexion: On the base of the description of the text, what are the roles (max 2) you think you have fulfilled so far in this PBL team, and what do you think about the members of your teams? Use the table below for thinking about it. | | 10 min | | | | | | |
| <p><u>Group work:</u></p> <ul style="list-style-type: none"> PBL groups turn to each other and discuss the results The groups formulate their questions towards the teacher regarding their results/controversions (Possible question from the teacher: What are the missing roles? What are the roles on which you could not agree?) | | 15 min | | | | | | |
| <table border="1" data-bbox="293 1549 1089 1829"> <thead> <tr> <th data-bbox="293 1549 599 1654">Name of the student</th> <th data-bbox="599 1549 1089 1654">Team roles perceived so far (max 2)</th> </tr> </thead> <tbody> <tr> <td data-bbox="293 1654 599 1759"></td> <td data-bbox="599 1654 1089 1759">#1 #2</td> </tr> <tr> <td data-bbox="293 1759 599 1829"></td> <td data-bbox="599 1759 1089 1829">#1</td> </tr> </tbody> </table> | Name of the student | Team roles perceived so far (max 2) | | #1 #2 | | #1 | | 5 mins |
| Name of the student | Team roles perceived so far (max 2) | | | | | | | |
| | #1 #2 | | | | | | | |
| | #1 | | | | | | | |



| | | | |
|--|----------|--|--|
| | #2 | | |
| | #1 #2 | | |
| | #1 #2 | | |

- Closing remarks from the teacher
 - these roles are dynamic, and are not necessarily remain the same in every environment
 - read the strengths and weaknesses featuring your type because they might help your self-awareness and personal development

Homework: because of Covid 19, travel restrictions are introduced. The transnational project meeting is scheduled in 2 weeks. How do you handle the situation?

1. Write a letter to partners, find out their intentions, find a compromise.
2. Write to the national agency as well – find out their standpoint
3. Prepare an infographic on the risks posed by the situation.

Further readings for the teacher

Gillian Smith, Pat Yates: Team role theory in higher education. www.trainingjournal.com March 2011 <https://www.belbin.com/media/1819/tj-article-team-role-theory-in-higher-education.pdf>



Annex 3. 5. 1

Ppt file is available at

https://www.dropbox.com/s/ztf0ggiv5hhmytw/Annex_3.5.A_Belbin.pptx?dl=0



How am I as a team member?

- 1970s, Meredith Belbin
- team role = "*a tendency to behave, contribute and interrelate with others in a particular way*"
- 9 types – all of them are needed for a successful team
- <https://www.belbin.com/about/belbin-team-roles/>

Co-funded by the Erasmus+ Programme of the European Union  This project has received funding from the European Union's Erasmus+ programme under the registration number 2019-1-HU01-KA203-061233.



Steps to do

- Click this link (in the chat window as well) <https://www.belbin.com/about/belbin-team-roles/>
- What do you think, which type(s) did you play in the team exercises?
- Read your "type description"(s)

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Steps to do

- Sit around in your PBL groups
- Discuss one by one :
- A) How do you evaluate yourself according to these types?
 - B) Complete each other's feedback with some remarks

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Lesson 6: Team Management and leadership

Learning outcomes to be developed:

- The student has a basic insight into the theories discussing the features and dynamics of team roles, procession and decision making
- The student will get familiar with the most important leadership models
- The student can select and apply the most adequate leadership model according to the given circumstances

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|--|----------------------------------|---------------|
| | | |



| | | |
|---|--|---|
| <p>Short feedback (10 mins) on the homework</p> <p>Frontal presentation by the teacher: introduction to leadership models.</p> <p>Class activity: leadership styles (Hersey, Blanchard) Morgeson? In case of Morgeson:</p> <ul style="list-style-type: none"> • The teacher describes the 15 elements shortly (1 sentence each). • The task of the students is twofold: (1) divide the elements into 3 groups: strength, neutral, weakness; (2) (s)he chooses 1 strength and 1 weakness that characterise him/her; (s)he does the same for a groupmate as well (has to choose blindly from a paper). • The students discuss how to improve in the future based on the task. <p>PBL task:</p> <ul style="list-style-type: none"> • a new event in the Storyline: (due to a conflict or problem) the leader of the team resigns and roles in them change: an acting leader is temporarily appointed • the acting leader is facing a challenge: <p>Tasks: distribution of tasks, agreement on deadlines, communication with project partners. Write formal letters to partners (the team leader should “sign” the letters) - have to agree on content, style, etc.</p> <p>on the base of the theories learnt, evaluating the performance of the the style and the tools of the 2 former leaders</p> <p>Homework</p> <ul style="list-style-type: none"> • optional task for extra points: select (short) movie scenes presenting certain leadership styles <p>e) Quick end-of-lesson feedback for the teacher - 5 minutes</p> | | <p>10 mins</p> <p>10 mins</p> <p>5 mins</p> |
|---|--|---|

| | | |
|---|--|--|
| <p>Competition by Socrative or Wordwall game with quiz questions related to the content of the lesson. <i>Results (scores) should be counted into the end of semester grade</i></p> | | |
|---|--|--|

Further readings for the teacher



- [Anna B. Kayes Edd, D. Christopher Kayes Phd](#)
- Team Leadership Questionnaire - Leader Edition: Improving leadership through learning
https://www.academia.edu/24234948/Full_Range_Leadership_Model



Lesson 7: Present and discuss a Project Management Plan

Learning outcomes to be developed:

- The student can follow the development of several simultaneous management tasks (eg. team management, cost management) and prioritize the most relevant ones at different stages of project management.
- The student is critical regarding own work and that of others taking on a constructive attitude.
- The student takes responsibility about own work.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
|--|---|---------------|
| <p>a) Presentation of homework and movie scenes selected (in the teaching material) Based on the movie scenes, the group discuss the different leadership styles (based on a given theoretical framework / article)- Full range of leadership</p> <p>PBL task</p> <ul style="list-style-type: none"> • The groups finalize and submit their detailed project management plan • They present them to each other, in the form of an international webinar or stakeholder forum - we can invite for this event 2-3 representatives (in the form of online presence) of different actors related to research projects, such as <ul style="list-style-type: none"> ○ an RMA/financial officer from our institution ○ a researcher from our institution ○ a representative of a national agency dealing with the governance/allocation of a given fund ○ representatives of a company, NGO, professional association etc. working with our university | <p>Peer evaluation: students give points to each others presentation with supporting arguments. Results of peer evaluation will be counted into the final</p> | |

| | | |
|--|--|--|
| | <p>grade in a limited way. Teachers evaluation: teacher gives points</p> <ul style="list-style-type: none"> • for the accuracy and adequacy of students peer evaluation • for the presentation • according to the feedback of the invited experts | |
|--|--|--|



Module 4 – Research Impact and Public Engagement

Lesson 1: Research Impact: why research matters?

Learning outcomes to be developed:

- The student will become familiar and differentiate several RMA facilitation roles that add value to research (such as science communication, societal engagement, technology and knowledge exchange).
- The student can explore several paths to maximise research impact (for example by finding the ways to incorporate the most relevant 17 sustainable development goals into the research project).
- The student can understand the concept of research impact and the different areas of impact beyond academia.
- The student can distinguish between output, outcome and impacts.
- The student can explain the benefits that impact-driven research can bring to the economy and society.

Background information to the PBL tasks

In the course of Module 4, students will work with 3 different projects:

- a **“fictive” project**: the project that was given to them in Module 3 (according to the instruction of Module 3: *“ In case it is possible, work with the project proposals created in the previous semester can be continued, but other options have to be taken into consideration as well. An important requirement is that now, fully elaborated but not implemented project proposals are needed (with established phases, stages, activities, budget)”*)
- a **“real” project**: *The universities implementing foRMAtion project select a research project within their institution which*
 - *is expected to be still running at the time of the pilot courses*
 - *is strongly related with social impact, i. e. serving a goal directly serving a public interest objective*
 - *includes significant activities related to social engagement and responsibility*
- **foRMAtion project**: *Students will write articles, prepare promotional videos on and study the dissemination strategy of foRMAtion project*

| | | |
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| <p>- Review this list of scientific achievements from the aspect of the SDG goal you are fighting for, on the base of the following questions: What are the achievements</p> <ol style="list-style-type: none"> 1. that serve the given goal, 2. that could be connected with it 3. that are against it <p>- Prepare a scheme for a 1-minute-long speech (elevator pitch) to be presented at an internal management meeting for the 15 top leaders of your institution.</p> <p>- summarize your arguments and thoughts in a convincing way</p> <p>- Present your speech in front of the class who will have the opportunity to defend the interests of the project in question</p> <p>- In case of disagreement, listen to each other's arguments and reflect on them in a polite though persuasive way, e. g. by offering compromises, alternative solutions etc.</p> <p>c) Storyline task (25 mins): <challenge/task></p> <ul style="list-style-type: none"> • the groups prepare a mindmap for their project (that they had been working in the course of Module 3) • assign and indicate SDGs and possible impacts to their project and indicate them on the mindmap <p>e) Quick end-of-lesson feedback for the teacher - 5 minutes</p> <p><u>Wordwall</u> game with quiz questions related to the content of the lesson.</p> <p>f) Individual homework /PBL task:</p> <p>Write a short article (of min. 150 words) to be published on your project website presenting your project from the aspect of the SDGs:</p> <ul style="list-style-type: none"> • Which are the SDGs that are fostered by your research activities? • How will this be implemented? • What are the expected results in this area? | | <p>25 mins</p> <p>5 mins</p> <p><i>Results (scores) should be counted into the end of semester grade</i></p> |
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Lesson 2: Responsible Research and Innovation approach: the EU drivers for Impact

Learning outcomes to be developed:

- The student can explain Responsible Research and Innovation (RRI) principles and practices in its main thematic elements: public engagement, open access, gender, ethics, science education, science communication and engagement, and impact.
- The student can identify cross-cutting issues in a given project (e.g. ethical and gender issues) and identify different strategies to address them in different research projects.
- The student can argue about the reasons for promoting accountability, responsibility, ethics and integrity in research.
- The student can contribute to the design of activities and instruments fitted to each of the RRI principles.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

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| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
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| <p>a) Classwork: frontal presentation & brainstorming</p> <ul style="list-style-type: none"> • identify ethical issues that can emerge during the project – and how to solve them. • Possible topics: GDPR, issues that might emerge in connection with interviews, etc. • generating a debate where students can come up with pro and con arguments • concrete examples related to ethical issues regarding the “real project” (see here) will be discussed in the presentation below (b)) | | 10 mins |
| <p>b)</p> <p><i>The universities implementing foRMAtion project select a research project within their institution which</i></p> <ul style="list-style-type: none"> • <i>is expected to be still running at the time of the pilot courses</i> • <i>is strongly related with social impact, i. e. serving a goal directly serving a public interest objective</i> • <i>includes significant activities related to social engagement and responsibility</i> <p>Activity related to the chosen project:</p> <ul style="list-style-type: none"> • invitation of an RMA of the give project team who gives a 10 minutes long presentation on the project, in line with the following topics (these have to be sent the expert in advance, as well as two resources that will be used in the following lessons: The six main categories of purpose for public engagement and D3.2 Public Engagement Methods and Tools of Engage2020) <ul style="list-style-type: none"> ○ <u>Basic info</u> on the project: source of the grant, programme, duration, partners, results so far ○ Why did you launch the project, what was the idea behind it? What are the main goals of your project? How does it serve public goals /society? ○ Who are the target groups and the involved <u>stakeholders</u>? ○ How did you find the way to the stakeholders, how did you address them? ○ What are the platforms and the means of <u>dissemination</u>, who are the target groups of the dissemination? | | 25 mins |

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| <ul style="list-style-type: none"> ○ Ongoing and next project tasks, especially in the field of communication ○ What are/can be the purposes of the engagement of the project with the given stakeholders, according to the 6 categories? ○ What are the main main messages that you would like to transfer to them. ○ What kind of information do you include in your messages and in which channels in order to emphasize and support your message? ○ Challenges and the ways to tackle them, especially in the field of ethics and conflict of interests ○ <u>Ethical issues</u> emerged ● Questions and answers by the students <p>PBL/Storyline activities</p> <p>Classroom activity connecting the two phases:</p> <p><u>Introduction</u></p> <p>In Module 4, an important output of students' activities will be a promotional video that will present students' experiences on foRMAtion project to different target groups and stakeholders such as</p> <ul style="list-style-type: none"> - an international professional organization, e.g. EARMA, - BA students of their university (aim: to promote the course within the university) - the top management of their own institution (aim: to raise awareness regarding RMA as a profession and to promote the project within the institution) - an NGO or company or a national EU funding agency working in cooperation with the university in other projects or activities (its aim is to raise awareness regarding RMA as a profession and promote the university's training in this field). <p>Each PBL group will prepare a separate, 2-3 minutes long video, addressing a different target group. They will define and formulate the message and choose the style of the video according to the relevant strategies of foRMAtion project.</p> | | 50 mins |
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| <p>E-mail from the “head of unit”:</p> <ul style="list-style-type: none"> • The new and last team leader is finally appointed by the “head of unit” - the new leader should be the 4th student, preferably the one who has been responsible for communication so far. In his e-mail, the senior leader justifies his choice with the fact that in this phase of the project, expertise in the field of communication is essential. • The article below is also attached to the letter, together with the given target group, stakeholder. <p>Activities to be implemented this lesson, according to the e-mail of the “head of unit”:</p> <ol style="list-style-type: none"> 1. Read the article identifying the six main categories of purpose for public engagement https://www.publicengagement.ac.uk/doing-engagement/quality-engagement/purpose 2. Each group is informed about the stakeholder which will be the target group of their video 3. They have to study the dissemination plan (relevant strategic document) of foRMAtion project (available in Annex 4.2.C) 4. Send a written answer to the questions below, on the base of the article and the dissemination plan in a Google Document that is shared with the team members and the teacher. <ul style="list-style-type: none"> ○ What are/can be the purposes of the engagement of foRMAtion project with the given stakeholder? ○ On the base of your conclusions, formulate 2-3 main messages that the video of your team should transfer. ○ What kind of information should be included in your video in order to emphasize and support your message? <p>Homework:</p> <ul style="list-style-type: none"> • PBL teams further develop their answers for the questions above (PBL/Storyline activities) • Brainstorming about the participants, messages, parts, content, style (music, place of the video) in the same Google Document that was used in class | <p>Until the next class, teacher sends feedback, correction & evaluation for this homework, as students</p> | |
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| <p>Optional individual homework for extra points: Compile a written answer to the questions above in the form of a formal letter (of 300 words) that will be submitted to the Management Boards, on the base of the article, the dissemination plan.</p> | <p>will work with it in Lesson 3</p> | |
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| <ul style="list-style-type: none"> • in groups of 2, students are given the public engagement plan • they have to identify the purpose, stakeholders, activities based on the documents. • They answer the following questions on the base of the examples of the tables published in D3.2 Public Engagement Methods and Tools of Engage2020 http://engage2020.eu/media/D3-2-Public-Engagement-Methods-and-Tools-3.pdf (pages iii-xi): What is the level of public engagement targeted by the document you are studying? How could you further develop/complete this plan? Students answer the questions on writing, in a Google Form created for this purpose. Guide for teachers for the application of Google Forms in classroom work is available in Annex C • discuss findings in class, using the spreadsheet generated on the base of the responses arrived to the form. | | 20 min |
| <p>c) PBL task on PEP: The groups start preparing the Public Engagement Plan (PEP) of their “fictive” project (the one they have been working on from the beginning of the semester) in the form of a mindmap.</p> <ul style="list-style-type: none"> • They will use a template given by the teacher. (Question to NOVA: can you suggest a basic plan /example that we can use for this purpose?) • They decide on the main parts of the plan and the leader of the team shares the tasks among the students that they have to prepare as homework. It is recommended that the leader of the group writes a short reminder of the task to make the distribution of parts and tasks clear of the members of the group. | <p><i>The groups receive a common score (max. 40 points) that has to be divided among each other according to the team-members self-evaluation. (Each team member estimates the number of points considered as a fair and consistent with its performance)</i></p> | 5 mins |
| <p>e) PBL task related with the promo video:</p> <ul style="list-style-type: none"> • Feedback on the homework (brainstorming): discussing the distribution of the points (see the remarks in the “Evaluation” column). In case of disagreement, the leader takes the final decision. • the teams decide on the tasks related with the video-making: editor, cameraman, graphic elements, actors etc. All members have to be responsible for the content/text. | | 20 min |

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| <ul style="list-style-type: none"> ● On the base of the homework and the classroom work, <u>making final decision on the following</u> questions: <ul style="list-style-type: none"> ○ What are/can be the purposes of the engagement of foRMAtion project with the given stakeholder? (see the 6 main purposes) ○ What should be the level of public engagement in relation with your target group? ● On the base of the above and the homework, formulate 2-3 main messages that the video of your team should transfer. ● What kind of information should be included in your video in order to emphasize and support your message? ● How should be the video: <ul style="list-style-type: none"> ○ style (emphasizing funny, professional, convincing, surprising etc. features) ○ music? ○ participants ○ basic ideas, story ● In case of disagreement, the leader takes the final decision. <p>e) Homework</p> <ol style="list-style-type: none"> 1. Preparing a given part of the PEP of the “fictive” project, according to the instructions of the team leader. (The complete PEP has to be submitted as the “product” of the group.) 2. Each student reflects on his own leadership style on the base of the Team Leadership Questionnaire by Morgeson (2010). This will be used in the course of the next lessons’s classroom work. | | |
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Lesson 4: Science communication and dissemination: framing the message

Learning outcomes to be developed:

- The student can distinguish the aims and activities pertaining to science communication, dissemination and broader impact
- The student can effectively communicate ideas and the main results of a given project to non-specialist audiences, applying different strategies to increase audience interest and understanding.
- The student can design a research engagement plan and identify suitable key performance indicators to assess stakeholder engagement.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and suggested scores | Timing |
|--|---------------------------------|-------------------------------|
| <p>a) Theoretic content: Purposes and features of communication/dissemination and exploitation</p> <ul style="list-style-type: none"> - Students read individually (5 mins) the same text (IO2 Curriculum, Module 4, Lesson 4, p 206-209) https://docs.google.com/document/d/1tmUS3ZbA0drt9ugC8a7_1PXz2cljMTQi/edit#heading=h.2y3w247 > and get different questions regarding <ul style="list-style-type: none"> - communication plan - dissemination plan - exploitation plan <p>The teacher projects each question separately on a slide (See the ppt available in Annex 4.4.A https://www.dropbox.com/s/mdryokid2dsws7i/Annex_4.4.A_Module_4_Lesson_4_to_drive.pptx?dl=0) and addresses them to different students, by random selection. (Optionally, students can answer via Kahoot)</p> <ol style="list-style-type: none"> 1. Which type of activity is addressing the widest audience? 2. Which are the typical platforms of communication? | | <p>20 mins</p> <p>30 mins</p> |

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| <p>3. What is the difference between the aims of the communication and dissemination?</p> <p>4. When does the process of communication start?</p> <p>5. When does the dissemination start?</p> <p>6. When does the exploitation start?</p> <p>7. How long do the exploitation activities last?</p> <p>8. To which activity do the following platforms and tools belong?</p> <ol style="list-style-type: none"> articles of scientific journal professional workshops trainings and strategic consultations participation in common publications Twitter posts? <p>9. What kind of activities belong to the exploitation?</p> <p>The teacher calls for them personally to answer the given questions (questions are presented on the slides one by one). Between the answers, whenever it is needed, the teacher explains features of the 3 types of activities by the help of the infographics included in the presentation (see Annex 3.4.A)</p> <p>Teacher interview with the communication expert of foRMAtion project, with the following questions:</p> <ul style="list-style-type: none"> Interview with the RMA of foRMAtion <ul style="list-style-type: none"> Who are the potential users of foRMAtion project? What are the main platforms where they are addressed? Who do you consider as the target audience of the dissemination of project results? Who are the wider audience for whom we would like to communicate the project results? Were there any changes compared with your preliminary expectations? <p>PBL tasks:</p> <p><u>Group work:</u></p> <p>The groups receive an e-mail from the head of unit (see the tasks and the worksheet in Annex 4.4.F)</p> <ul style="list-style-type: none"> <i>group members submit their answers by e-filling in the table on the online interface used in the lesson</i> <p><u>Classroom work:</u></p> | <p>Apart from the teacher, a member of the “real” project coordination team gives students evaluating feedback as well</p> | <p>20 min</p> <p>15 min</p> |
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| <ul style="list-style-type: none"> • <i>The class discusses the answers in the form of a workplace meeting. Group representatives report on the results of their group in front of the class.</i> • <i>The teacher summarizes and demonstrates the answers of students in the form of an online Coggle mindmap elaborated by answer to answer, (see an example for a ready mindmap on TELLME in Annex 4.4.E https://www.dropbox.com/s/my5w5xa3r30dmch/Annex_4.4.E_TELLME_excerpts.docx?dl=0 and at this link: https://coggle.it/diagram/X1is0zfdS9ZF3xIH/t/framing-the-message-of-tellme-project/9db5fdd86639422e773940180f81e0f5b9e40c31b5b887631cc6fc69c9737c4a)</i> <p><u>PBL group work:</u></p> <ul style="list-style-type: none"> • <i>an urgent message from the head of unit:</i> <p>Individual work:</p> <ul style="list-style-type: none"> • PBL group members write individually a blog post / a Twitter post / a Facebook / a website / or LinkedIn post on the “real” project chosen by the teacher, on the base of a project progress report and the project website. Each member is given a different genre by the group leader. • Optional task: Finalization of Public Engagement Plan of the “fictive” project <p>Group work:</p> <ul style="list-style-type: none"> • Evaluation of leadership skills using the Team Leadership Questionnaire by Morgeson (2010) using the “hot seat” method: someone is chosen to be evaluated; the other 3 writes down their thoughts on the base of the following questions: <p>a) What were his strengths as a leader? b) What are his areas of development? c) What did I enjoy/appreciate in him/her personally?</p> <p>The teacher has to enhance that the goal of the evaluation is to encourage each other and give each other feedback in a positive way.</p> | <p>10 points</p> <p>Teams give themselves up to 10 points / person for their activity, based on self-assessment</p> <p>+5 points</p> | <p>5 min: instructions</p> <p>15 min: elaboration of texts</p> |
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| <p>Homework:</p> <p>PBL groups work on and finalize their promotional videos according to the feedback of the teacher.</p> <p>Optional task for extra points: design a Facebook page for the project (based on a given framework - not a public one)</p> | | |
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Further reading.

- Dunleavy, Patrick (2014) Shorter, Better, Faster, Free. Blogging changes the nature of academic research, not just how it is communicated.
<https://blogs.lse.ac.uk/impactofsocialsciences/2014/12/28/shorter-better-faster-free/>
- Oakes, Kelly (2014) How to Create a Successful Science Blog
<https://www.theguardian.com/science/2014/apr/17/science-blog-wellcome-trust-writing-prize>
- Thody Angela (2006): Writing and Presenting Research
<http://elearn.luanar.ac.mw/odl/public/Files/Angela%20Thody's%20Writing%20and%20Presenting%20Research.pdf>
- Example for project communication plan:
https://www.dropbox.com/s/vqzz0x79ptbrnsz/Annex_4.4.C_foRMAtion_Communication_Plan_with_Visual_Identity.pdf?dl=0

Annex 4. 4. F – E-mail from the Head of Unit

Dear Colleagues,

The leader of your team from today is [...].

You have 2 tasks to do within 20 minutes:

- Please, on the base of the profiles, finalize the table below indicating the roles and the names.
- In 20 minutes, we will have a meeting where we will discuss the communication issues of the TELLME project. Yesterday the project groups were formed and received the project application. The deadline is approaching to prepare the communication, the dissemination and the exploitation plans. In order to do that, the task of the group is

- to identify the possible stakeholders and audiences of the TELLME project,

- assign the different stakeholders, target audiences to the different plans

| | Target groups | Platforms |
|----------------------|----------------------|------------------|
| Communication | | |
| Dissemination | | |
| Exploitation | | |

Please use now the shortened version of the TELLME_excerpts.doc.

https://www.dropbox.com/s/my5w5xa3r30dmch/Annex_4.4.E_TELLME_excerpts.docx?dl=0

The team, with the direction of the leader of the team, has to divide the task among the members - you have to report about your ideas in 20 minutes!

Best,

Head of Unit

Lesson 5: Public engagement plans – group presentation and discussion

Learning outcomes to be developed:

- The student can act to facilitate processes in the context of a simulated science engagement situation.
- The student can design a research engagement plan and identify suitable key performance indicators to assess stakeholder engagement.

Legend for the use of lesson plans: Grey texts describe useful but elective activities while black text colour indicates activities considered essential.

| Teaching ideas: Methods, tools, illustration, problem, game etc. | Evaluation and assessment | Timing |
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| <p>a) PBL task: Presentation of the promo videos. They will present students' experiences on foRMAtion project to different target groups and stakeholders such as</p> <ul style="list-style-type: none"> - an international professional organization, e.g. EARMA, - BA students of their university - the top management of their own institution - an NGO or company or a national EU funding agency working in cooperation with the university in other projects or activities (aim is to raise awareness regarding RMA as a profession and promote the university's training in this field) <p>in the frame of</p> <ul style="list-style-type: none"> • an international webinar (if the dates can be reconciled among the 3 universities) presenting the project • OR: a fictive stakeholder/workshop forum where the class members will play the role of the several stakeholders <p>b) Course-evaluation roundtable (including the report of the teacher as well):</p> <ul style="list-style-type: none"> • “What were the most important things you learnt in this course?” | <p><i>Peer assessment:</i></p> <ul style="list-style-type: none"> - students give points to each other's videos on the basis of the evaluation form. - In case the videos of the parallel courses (NOVA & Sapientia) cannot be presented, students give oral feedback | |

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| <ul style="list-style-type: none"> • “Share something you liked and appreciated.” • “What are the areas where we could further improve it?” <p>PBL homework: Groups have to submit</p> <ul style="list-style-type: none"> • the updated and finalized project management plan until a predefined deadline • <i>Optional assignment: a report on the project results compiled on the base of the form prepared by the teacher (see Annex...)</i> | <p><i>regarding each others’ videos. Teachers’ question launching the conversation: “Which features of the video that reflect the aspects and the needs of the given target group?”</i></p> | |
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Further reading:

- An example to study:
<https://ec.europa.eu/research/participants/documents/downloadPublic?documentIds=080166e5c48ab206&appId=PPGMS>
- Guide
<http://globeducate.s3.amazonaws.com/PDF%2FPublic-engagement-a-practical-guide.pdf>

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<https://blogs.lse.ac.uk/impactofsocialsciences/2014/12/28/shorter-better-faster-free/>
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- Éva Farkas: Segédlet a tanulási eredmények írásához a szakképzési és felnőttképzési szektor számára. Oktatási Hivatal, Budapest, 2017
- Éva Tót: Segédlet a tanulási eredmények írásához a felsőoktatási szektor számára. Oktatási Hivatal, Budapest, 2017

- Flynn, L. R., & Goldsmith, R. E. (2013). Case studies for ethics in academic research in the social sciences. SAGE Publications, Inc. <https://www.doi.org/10.4135/9781452269986>
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- The framework of qualifications for the European Higher Education Area. Tuning - Educational Structures in Europe. <http://www.unideusto.org/tuningeu/>
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4. Annexes

Further annexes and supporting documents are available at the following links:

Module 1

<https://www.dropbox.com/sh/ja41h9uxtibt71h/AADa6wPb6LaL4ncjWY5mFRSma?dl=0>

Module 2

<https://www.dropbox.com/sh/wofn6z3k4wzz2ea/AAB32RjRRs URwHoL4X10gw a?dl=0>

Module 3

<https://www.dropbox.com/sh/ofhj288fdq5uolw/AAAGaKTx2zMfNHICEMs3Ebd1a?dl=0>

Module 4

<https://www.dropbox.com/sh/74igph7dso15lqz/AAAhO36HSMM9pHGVW7FNpioha?dl=0>





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