



D15.3

Joint plan of action between the RITrain project and ENVRIplus

WORK PACKAGE 15 – Training & E-Learning

LEADING BENEFICIARY: UNIVERSITY OF AMSTERDAM

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Abstract

This deliverable is set up as a plan of action between two EU-H2020 projects in the realm of Research Infrastructures. ENVRIplus has expressed the interest in collaborating with the Rltrain project to develop a specific training event for management staff in environmental RIs connected to the ENVRIplus project.

Rltrain is a Coordination and Support Action, funded by H2020 to develop professional management training for staff in the various emerging Research Infrastructures (RIs) in Europe, following the implementation of the ESFRI process. Rltrain is a follow up of the RAMIRI programmes which started this process by offering site visits and dedicated training workshops, and were positively evaluated. The new project has a specific aim to professionalize this initial process and sustain it -among other initiatives- into a master curriculum.

The first years of the project period were used by Rltrain to start up and develop a framework and content for the training program. ENVRIplus has been involved from the onset and this deliverable has been developed in close cooperation and discussion with the main project partners in Rltrain.

The aim is to deliver a 1-2 day workshop during an ENVRIweek (dedicated six monthly project-wide meetings of all partners and stakeholders in ENVRIplus) to introduce the full content of the master programme Rltrain has developed. At the same time, by bringing together management staff from environmental RIs we aim to initiate a network of knowledge among these staff members, to be able to consult and discuss best practice whenever useful and needed.

Project internal reviewer(s):

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Document history:

| Date | Version |
|-------------|--|
| 08-03-2017 | V1 First draft of content for discussion and review by Rltrain |
| 27-03-2017 | V2 with suggestions/improvements from Rltrain |
| 03-04-2017 | V3 in official template for internal review |
| 25-04-2017 | Final version including comments from internal reviewers |

Document amendment procedure

Amendments, comments and suggestions should be sent to Jacco Konijn (j.l.konijn@uva.nl)



Terminology

A complete project glossary is provided online here: <https://envriplus.manageprojects.com/s/text-documents/LFCMXHHCwS5hh>

Project summary

ENVRiplus is a Horizon 2020 project bringing together Environmental and Earth System Research Infrastructures, projects and networks together with technical specialist partners to create a more coherent, interdisciplinary and interoperable cluster of Environmental Research Infrastructures across Europe. It is driven by three overarching goals: 1) promoting cross-fertilization between infrastructures, 2) implementing innovative concepts and devices across RIs, and 3) facilitating research and innovation in the field of environment for an increasing number of users outside the RIs.

ENVRiplus aligns its activities to a core strategic plan where sharing multi-disciplinary expertise will be most effective. The project aims to improve Earth observation monitoring systems and strategies, including actions to improve harmonization and innovation, and generate common solutions to many shared information technology and data related challenges. It also seeks to harmonize policies for access and provide strategies for knowledge transfer amongst RIs. ENVRiplus develops guidelines to enhance transdisciplinary use of data and data-products supported by applied use-cases involving RIs from different domains. The project coordinates actions to improve communication and cooperation, addressing Environmental RIs at all levels, from management to end-users, implementing RI-staff exchange programs, generating material for RI personnel, and proposing common strategic developments and actions for enhancing services to users and evaluating the socio-economic impacts.

ENVRiplus is expected to facilitate structuration and improve quality of services offered both within single RIs and at the pan-RI level. It promotes efficient and multi-disciplinary research offering new opportunities to users, new tools to RI managers and new communication strategies for environmental RI communities. The resulting solutions, services and other project outcomes are made available to all environmental RI initiatives, thus contributing to the development of a coherent European RI ecosystem.

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Joint action plan between RITrain and ENVRIplus

Background

The ENVRIplus project, where 20 Research Infrastructures in the Environmental area collaborate contains a work package dedicated to training of RI staff. This staff and related experts can be separated into three distinct function categories: Technical staff (hardware, software and ICT infrastructure related), scientific staff (related to the core services the RI needs to perform to optimally support scientific research) and management staff, hired by both individual institutes and legal persons like ERIC's to organize and support the business from an administrative, legal, financial, governance and Human Resource point of view. In many of the emerging Research Infrastructures, with still light coordination bodies, the same person can endorse more than one role even if her/his expertise is in one domain

ENVRIplus focuses very much on services to be developed for both technical and scientific activities in the RI's, but wants to promote the professional approach towards management of an RI in the environmental research area as well, by offering dedicated management training to its staff. This training should focus on the typical aspects of managing a Research Infrastructure in Europe, rather than 'any' business or institute, as well as touch upon the specific management issues for Environmental RI's, most notably the usually very distributed character of the organization and the often almost complete virtual instead of physical access for scientists. Financial life cycles, legal issues regarding national legislation (on Human Resource policies for instance), IPR arrangements, procurement rules, management and selection of access etc. are very much affected by these typicalities and require other-than-standard management approaches.

The experience with these new types of (often distributed as opposed to single sited) organizations is still relatively new and regular management type training (i.e. in education like business schools) doesn't fully cover the range of issues at hand, while at the same time the demand for this profession is growing in Europe, with the dedicated efforts (and investments) of the EU and its Member States to establish a full landscape of Research Infrastructure facilities with long term prospects.

The RAMIRI programmes proved that the existing experience in Europe is highly valuable to be passed on to the next generation of management staff. Experts with over 30 years of experience in setting up and maintaining RI facilities provided training on various topics to the new generation of RI managers, both from the new legal entities but also from related institutes that contribute to the network of organisations that sometimes constitutes an RI.

Due to the mentioned novelty of the new generation of RI's with distributed access and operations, training didn't focus that much on these issues; it was difficult to find the experienced staff to deliver this training. Nevertheless, the relevance of RAMIRI was acknowledged by all stakeholders, be it participating 'students', training staff, leaders of RI's or the main funder, the EC.

A very valuable 'extra' outcome of the RAMIRI project was the network of management staff participants it created, that actively stayed in contact and consulted each other while performing their daily work. Quite a few of them still meet, now in ESFRI related workshops on best practices in RI's in Europe.



The RItrain project

RItrain (www.ritrain.eu) is funded by the European Commission with the specific task to lift training and education in RI management to the next level. RItrain will begin its new executive master programme in RI management (EMMRI) in autumn 2017, which has been developed by the University of Milano Bicocca in collaboration with the other RItrain partners – all representatives of European RIs. For this first iteration of the Master's programme, the university has waived the tuition fees, making this a unique opportunity to participate in the course at a significant cost saving. The course incorporates staff exchange programmes and webinars to extend the knowledge base and share best practices among the current generation of RI management staff. These elements can also be used as standalone training.

The master programme (flyer attached) is tailored for busy executives by organising its 60 ECTS into a mixture of face-to-face and online activities held by international faculty and senior managers from RIs. It comprises 15 modules focusing on the specific challenges faced by RI managers and leaders. The curriculum has been informed by the outcomes of a survey and a competence/skills brainstorming workshop that RITrain organised and to which ENVRIplus contributed¹. Interested staff can also decide to follow one or several modules individually, without doing the full master programme to specifically train on certain topics that are most relevant to them.

RITrain and ENVRIplus

Within the Description of Action of ENVRIplus, a specific task (15.3) is dedicated to organising a workshop for ENVRIplus related RI management staff. This workshop should cover at least on an introductory basis the main topics as addressed above, with a focus on the distributed character of the RI facility.

To that end, the aim is to benefit from the products that are currently being developed in the RItrain project, mostly the training modules which are part of the master program.

The main objectives of the workshop follow from the described reasoning on the importance of the education of Management staff:

- Knowledge transfer based on the developed competence profile of the RITrain master program;
- Discuss the typical aspects of distributed RIs with different types of access and services;
- Exchange of best practices among management staff in Environmental RIs and toward training staff in RItrain;
- Initiating a network of Environmental RI management staff to benefit from a joint knowledge base in daily work issues;
- Creating awareness of the full master program organised by RItrain as well as other initiatives.

RItrain also represents a large community of managers in RIs and the workshop should have as extra benefit the connection between these communities. This can be organised in several ways and will be discussed with RITrain.

¹ http://ritrain.eu/news/-/asset_publisher/xGZjc0t0o4b2/content/ritrain-and-corbel-workshops Jacco Konijn participated



Workshop Setup

ENVRIplus is organised around 6-monthly meetings where all project partners gather, ongoing work is presented and workpackages, tasks etc. meet to discuss progress. At the same time, these so-called ENVRIweeks are used to host specialist workshops. Since ENVRIweeks are attended by almost all relevant partners and persons in the project, the importance of being there is evident.

However, the RI management workshop audience usually does not attend in full these ENVRIweeks, as the project is of course mostly organized around the technical and ICT/data solutions. The fact that several colleagues also attend, will facilitate a good attendance of people that often do not travel that much and have very busy jobs in their daily effort to setup and keep an RI facility running.

The workshop should contain both theoretical talks as well as practical (case study) work in smaller groups to discuss best practices, work on joint solutions and getting to know each other. These use cases need preparation by the trainers, based on the content of the theoretical sessions.

The topics to be addressed should of course match with the offering of the master's curriculum. A selection must be made as time is limited. This depends on preferences of the audience, immediate relevance based on the above-described aspects of the Environmental RI management 'landscape' and the availability of trainers. One can think of:

- Procurement in distributed organizations (across countries, legal issues, tax issues)
- Professionalize communication
- Human Resource management (contracts, national legislation differences etc.)
- Moving from project management to process management
- Negotiation skills,
- Conflict management also in distributed facilities
- Cash flow/liquidity/investment management in ERICs (wrt EU projects, buying expensive equipment, upgrades, decommissioning etc.)
- Creating a business and funding plan for environmental research infrastructures

A proposed agenda for a workshop could be the following:

- Opening, introduction of the RI Train project, objectives and products. How it services the RI community (45 mins)
- Theoretical session 1 (120 mins.)
- Theoretical session 2 (120 mins.)
- Theoretical session 3 (120 mins.)
- Practical use cases (3, parallel, 120 mins.)
- Presentation of use cases and closing (60 mins.)

This would justify a 1.5 day workshop, starting after lunch on day one followed by a full day.

Alternatively, the 3rd theoretical session could be dropped in favour of more practical work, allowing the participants to do two (identical) use cases in different groups and compare outcomes in plenary presentations.

It is of course acknowledged that not all topics can be selected. Also, the master curriculum will probably contain other topics and more. But in this way the workshop can at least give a flavour of what is available and taught at the master level, as well as illustrate the necessity to be well and professionally trained in specific management aspects in running an RI.



The introductory workshop can thus act as a catalyst for further training in one, several or all modules that the master curriculum comprises.

The aim currently is to organize this workshop during the 6th ENVRIweek, taking place from 14-18 May 2018 (Zandvoort, The Netherlands)

Audience

Currently, ENVRIplus consists of over 20 RIs that are represented in the project itself. Moreover, several 'associated partners' have joined in the discussions since the start of the project.

Considering that each RI will represent at least 1 participant, and some will send more, we can assume an audience of about 35-40 people attending this workshop.

Currently, the task leader is collecting names of potentially interested persons to notify about this workshop.

The relevant audience for this workshop obviously is employed by the current ERIC's and other legal entities that are already in place, but also related organisations that constitute the distributed facility, either in construction or as permanent network. So the pool of organisations and available personnel is much larger compared to the number of 'single organized' legal entities.

Regarding function categories of the targeted staff one can think of the following:

- Governance (CEO's, directors)
- Finance
- Human resources
- Communication/Outreach/Marketing
- Project managers
- Legal

Action items to organize the workshop

- Collect names of relevant staff for the event to be invited
- Agree on setup, agenda and topics with RItrain
- Develop Course material, publish it
- Set up budget for the workshop (funding in T15.3 is available)
- Agree with trainers on honorarium/reimbursement, travel
- Agree on date and time, logistics (no. of rooms etc.)
- Send out invitations to participants
- Possibly fund travel for participants (partly? rules?)
- Advertise the workshop and stimulate registration.

These action items will be elaborated into a detailed project plan when the organisation of the actual workshop will start. A first meeting to kick things off is planned for September 2017.

Additional actions with ENVRIplus and RItrain

RItrain organizes a staff exchange programme (http://ritrain.eu/news/-/asset_publisher/xGZjc0t0o4b2/content/calls-for-applications-for-staff-exchange) where successful best practices on different topics related to RI management are presented in short visits by small groups. Besides this, RItrain is organising a webinar series featuring specific challenges that senior leaders of RIs have faced, and exploring how these can be overcome.



ENVRIplus can contribute to this programme by sending staff to these exchange visits (see http://ritrain.eu/news/-/asset_publisher/xGZic0t0o4b2/content/calls-for-applications-for-staff-exchange), offering to host exchange visits (by applying to the appropriate calls) and stimulate experts to volunteer for the webinar series. Theme 5 will stimulate this during the remainder of the project and the workshop should act as a source of concrete initiatives in this field.

The second contribution of course can be found in a feedback mechanism from the workshop. The master program is still in an experimental stage and the experiences and views of a room full of relevant audience is of course always valuable to the maturation of this curriculum. We will implement a detailed feedback mechanism for participants.

CONCLUSIONS

This report is only the start of a process, but the main results are that we have both enthusiasm on collaboration and agreement on the content with RItrain to move forward. Following this deliverable is a trajectory to organize the workshop in all its details as specified in the text above. This is a task for UvA, in collaboration with all Environmental RIs (they have to identify the relevant staff and send them to the event) and the RItrain project. Meanwhile, the other possible actions will have to be followed up, in case of interest and relevance. UvA (T15.3) will constantly monitor this and take action where necessary.

As said, the specific aim is twofold:

1. To introduce the master programme for RI management and to specifically train RI management staff from environmental RIs in selected aspects of this content
2. To create a network of people with similar jobs, that can, for future use, consult each other on specific issues on a more or less day-to-day business level. Thereby contributing further to an overarching objective of ENVRIplus to favour cross-fertilization between these RIs



APPENDICES

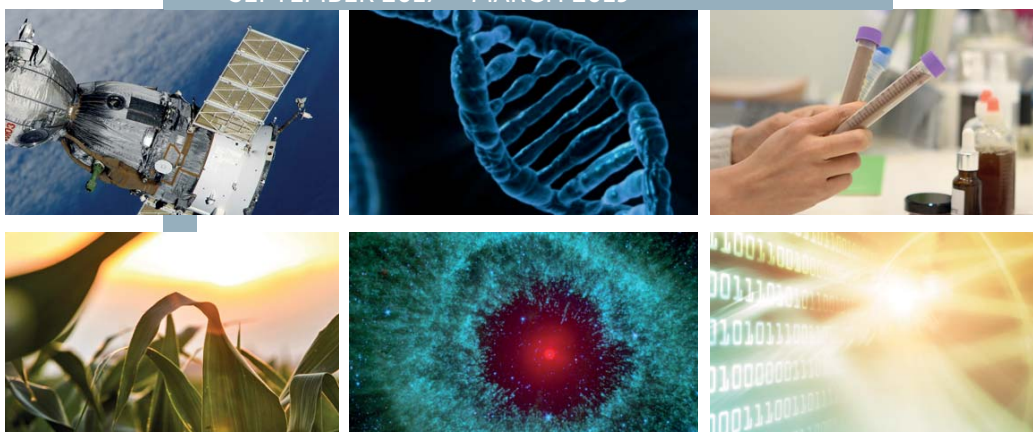
Appendix 1: Flyer for the Executive Masters in Management of Research Infrastructures



Launch of a unique international management development programme

EXECUTIVE MASTERS IN MANAGEMENT OF RESEARCH INFRASTRUCTURES

SEPTEMBER 2017 – MARCH 2019



In collaboration with Rltrain Partners



ABOUT Rltrain

Rltrain, the Research Infrastructure Training Programme, is an EU-funded Horizon 2020 project aimed at improving and professionalising the training of managerial and leadership staff in research infrastructures (RIs). Our vision is to develop a new generation of executives of national and international RIs and equip them with state-of-the-art managerial and leadership skills tailored to scientific services providers.

PROGRAMME STRUCTURE

The Masters programme is tailored for busy executives by organising its 60 ECTS into a mixture of face-to-face and online activities held by international faculty and top managers from RIs. The face-to-face modules last 3-4 days and run over 18 months.

| | | |
|------|-------------------------|---|
| 2017 | TERM I (Sep-Dec 2017) | <ul style="list-style-type: none"> • Core modules |
| 2018 | TERM II (Jan-Dec 2018) | <ul style="list-style-type: none"> • Core modules • Field projects development |
| 2019 | TERM III (Jan-Mar 2019) | <ul style="list-style-type: none"> • Optional module • Field projects discussion • Graduation Ceremony |

Previous education and experience will be recognised depending on our evaluation and pre-entry assessment.

