

DCitizens Fostering Digital Civics Research and Innovation in Lisbon

DELIVERABLE 5.2: Management Training Plan

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D5.2: Management Training Plan

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Executive Summary

This deliverable defines the activities for training IST-ID staff, including researchers and project managers. The goal of this activity is to enhance research management skills and increase funding success rate and execution. These skills include project management (planning, quality and risk assessment, conflict management, reporting), proposal writing (identifying funding bodies, consortium agreement, excellence, impact, and implementation), data management (how to collect, describe, store, preserve and share research data; produce high-quality Data Management Plan (DMP)), research ethics (conducting research with human subjects, engaging with vulnerable user groups, conflicts of interest, publishing bias), and intellectual property (research exploitation, intellectual property, bringing technologies to market).

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1 Introduction

This document presents the Management Training Plan for IST-ID partners within the framework of the DCITIZENS European Project. The training plan is designed to improve research management skills and increase the success rate of funding acquisition and project execution. The training program offers a diverse range of courses from IIT and IST-ID. The courses are grouped into several macro areas: Open Science and Research Management, Publication and Communication Skills, Ethics, Project and Proposal Management, Intellectual Property Rights and Entrepreneurship, and Career Development and Diversity. Moreover, during visits of IST-ID staff to IIT, we will organise specific hands-on sessions on data management and project writing that will better specialise the management staff and researchers in fundamental skills.

2 Macro Areas of the Training Program

IIT has developed a training program related to different courses that span the different skills required for project preparation and management. The courses are grouped into different macro areas. We describe the macro areas in the following sections. The details for each course can be found in Section 3 – 4.



2.1 Open Science and Research Data Management

Training within this area promotes the comprehension of open access scholarly communication and effective research data management. The program is comprehensive with courses that emphasize the intricacies of managing research data and mastering open data sharing and repositories. The goal is to equip researchers and project managers with the tools and knowledge to navigate the increasingly open and data-driven scientific landscape.

2.2 Publication and Communication Skills

In this macro area, the focus is on honing scientific writing, publishing, and communication capabilities. The courses offered cover a broad spectrum from understanding how to effectively publish research in reputable journals, to writing scientific articles that are clear, readable, and devoid of redundancy. Additionally, the training also addresses the crucial skills of public speaking and presentation, and the effective reporting of scientific results.

2.3 Ethics

This segment of the training underscores the importance of ethical considerations in project management. The curriculum is designed to ensure a thorough understanding of ethical principles and responsibilities that are paramount to the research process.

2.4 Project and Proposal Management

This area focuses on strengthening project and proposal management skills. With comprehensive modules, the training plan targets enhancing the competencies of researchers and managers in effectively managing scientific projects and developing winning grant proposals. It further emphasizes understanding the landscape of local and international funding agencies and the types of grants available.

2.5 Intellectual Property Rights and Entrepreneurship

Training within this area highlights the critical aspects of intellectual property rights, confidentiality, and entrepreneurship. Participants are introduced to the world of patents and copyrights, and the nuances of maintaining confidentiality in a professional setting. Furthermore, the training also focuses on stimulating entrepreneurial thinking, with workshops designed to guide participants in drafting business plans and converting ideas into viable business propositions.

2.6 Career Development and Diversity

This area aims to prepare participants for their professional careers and foster an understanding of diversity in science. Courses within this area touch upon aspects such as understanding the workings of a human resource department and the candidate selection process. The training also prepares participants to effectively present themselves in the job market, both within and outside academia. The emphasis on gender balance and diversity in science underlines our commitment to inclusivity and equal representation.

The updated training plan reflects our ongoing commitment to enhancing the skills of IST-ID staff and equipping them with the knowledge and tools necessary for research excellence and successful project execution.

3 Courses Offered by IIT and Hands-on Activities

3.1 Courses Offered by IIT

Table 1 describes relevant courses offered by IIT in both online and in-person format. Courses are ordered by priority levels (from high to low) for IST-ID management staff and their matching macro area. Priority levels were defined based on the skill gap at IST-ID to become more competitive in attracting and managing European funds.

Course Name	Priority Level	Macro Area	Month	Description
Project Management in Science	High	Project and Proposal Management	September	8-module in-person training, generally offered to IIT scientists and managers.
Fundraising: Writing a Grant Proposal	High	Project and Proposal Management	October	8h in-person/online course, held by IIT Projects Office and APRE . Program outline: how to develop a winning grant proposal, review of local and international funding agencies and type of grants available to post-docs.
Open Science and Research Data Management	High	Open Science and Research Management	September	10h in-person/online training by IIT Research Data Management support and Open Science support at University of Genova. Program outline: open access scholarly communication; planning research data management; open data sharing and repositories.
Protection of Personal and Sensitive data in Research	Medium	Open Science and Research Management	July	1h online course <i>GDPR Digital Learning</i> , offered to IIT Staff. Program outline: new GDPR context, what data protection means, when data are GDPR relevant, duties and responsibilities, risk analysis, DPIA, privacy by design and privacy by default, best practices.
Cyber-security	Medium	Ethics and Cybersecurity	October	3h online training campaigns delivered annually through Proofpoint Inc. Awareness Platform . Program outline: basic notions of information security with specific insights about Phishing,

				Mobile Device and PC Security, Safe Web Browsing and Email Management, Secure Password Management, Data Protection.
Confidentiality and IPR Management	Medium	Intellectual Property Rights and Entrepreneurship	December	In-person/online course held by IIT Technology Transfer. Program outline: industrial secret; trademarks and patents; author's rights and copyright, Italian and European contexts; fair use vs exceptions/limitations to rights, open licenses, confidentiality.
Research Ethics	Low	Ethics and Cybersecurity	November	4h online course. Program outline: identify ethical principles and responsibilities required of every researcher throughout the research process; research ethics in animal research.
Public Speaking and Presentations	Low	Publication and Communication Skills	October	2-day in-person training by Jacopo Pasotti. 2-3 workshops per year. Program outline: how to improve spoken communication and slide-based presentations; how to communicate with different stakeholders. 4h in-person course on Scientific Communication skills by Roman Krahné. Program outline: reporting scientific results, preparing conference and seminar talks.
High-tech Entrepreneurship Workshop	Low	Intellectual Property Rights and Entrepreneurship	June	8 in-person lectures (or 4 online) + 2 work-team meetings, held by IIT Technology Transfer in collaboration with Univ. Genova and Univ. Côte d'Azur. Program outline: Each of the 20 participants (per session) will be asked to present a business idea, and will learn how to draft a business plan.

Table 1. IIT training in research management skills.

3.2 Hands-on Activities: Data Management and Project Writing

As a crucial component of our training program, we also incorporate hands-on sessions in data management and project writing during each visit of IST-ID staff at the partner institution providing a set of activities. This practice-based approach is aimed at bolstering the skills of IST-ID staff in essential tasks that will significantly contribute to their future careers. We aligned these activities with the Staff Exchange Plan (Deliverable 1.1). They will occur in May 2023, October 2024, and June-August 2025.

During these hands-on sessions, participants will have the opportunity to simulate the various steps involved in project writing and data management. They will be guided through the process of planning a research project, drafting a proposal, collecting, and managing data, and finalising a report. This practical immersion into the fundamental aspects of research management will provide invaluable insights and will equip participants with the necessary competencies to handle real-world scenarios.

To make the most of these sessions, participants will be paired with an expert in the field during their visit to IIT. This mentorship model will allow for individualized feedback and guidance, fostering a learning environment that is tailored to the unique needs and skills of each researcher. The expert will provide real-time feedback, share their personal experiences and best practices, and help the participants identify areas of improvement.

The interaction with the expert can be organized in various ways depending on the needs and availability of the participants. It could involve one-on-one sessions and small group workshops, especially for project proposal and management. Additionally, these sessions could be complemented with online consultations and follow-up meetings to ensure continuous learning and improvement if necessary.

This hands-on approach to training, combined with the guidance of an expert mentor, will enrich the learning experience of the participants. It will not only strengthen their understanding of the theory but also boost their confidence in applying these skills in their professional endeavours. As such, it represents an invaluable addition to the IST-ID staff training program.

Experts in IIT include F. Piantentini (Pre-award support), I. Santori (Post-award support or project management), and V. Pasquale (Data management).

4 Courses Offered by Instituto Superior Técnico

Table 2 describes relevant courses offered by Instituto Superior Técnico (IST) in both online and in-person format. IST is the higher education institution associated with IST-ID. Courses are ordered by priority levels (from high to low) for IST-ID management staff and their matching macro area.

Course Name	Priority Level	Macro Area	Month	Description
Financial Procedures	High	Project and Proposal Management	January, March, September	6-hour remote session provided by IST Training and Development Unit Program outline: administrative and financial management of projects covering the negotiation process, opening, execution, and preparation of financial reports.
Recruitment Procedures	High	Project Management	January	2-hour remote session provided by IST Training and Development Unit. Program outline: types of research fellowships; research grants; hiring process, and other procedures
Horizon Europe	High	Project and Proposal Management	July	4 in-person sessions provided by IST Training and Development Unit. Program outline: networking, Part A, and budget; excellence, implementation, and impact; European policies
Team Leadership	Medium	Career Development and Diversity	November	2 hour in-person session provided by IST Training and Development Unit
Gender Equality and Equity Plan	Medium	Career Development and Diversity	December	2 hour in-person session provided by IST Training and Development Unit
Social Media	Low	Publication and Communication Skills	October, November	2 sessions, 2 hours per session provided by IST Training and Development Unit Program outline: strategy, identity, engagement; Facebook, Instagram, Twitter, LinkedIn and YouTube.
Leadership and Teamwork	Low	Career Development and Diversity	February to May	Total of 25 hours provided by IST Training and Development Unit

Table 2. IST training in research management skills.

5 Training Timeline

Figure 1 illustrates the proposed training timeline for IST-ID staff. It is noteworthy that all high priority courses are covered in the training timeline. Moreover, there is a higher training workload in the first year of the project to bootstrap the upskilling of existing staff. This upskill will allow our Research Management Unit (RMU) to train the next generation of researchers, administrative staff, and project managers. Hands-on training activities at IIT are planned for the duration of the project.

Within the first six months of DCitizens, the RMU already attended critical training at IST, which includes recruitment and financial procedures, and a six-hour online course offered by IIT on open science and research data management. Moreover, the Unit visited IIT as part of the Staff Exchange Program to received hands-on training on Data Management and Proposal Writing (see Secton3.2).

We plan to flight two project managers with expertise in pre-award and grant management from IIT to Lisbon after the summer (in 2023). This will allow IIT staff to be embedded in our research environment, provide targeted feedback about current practices and procedures, and deliver training to wider audience within IST-ID.

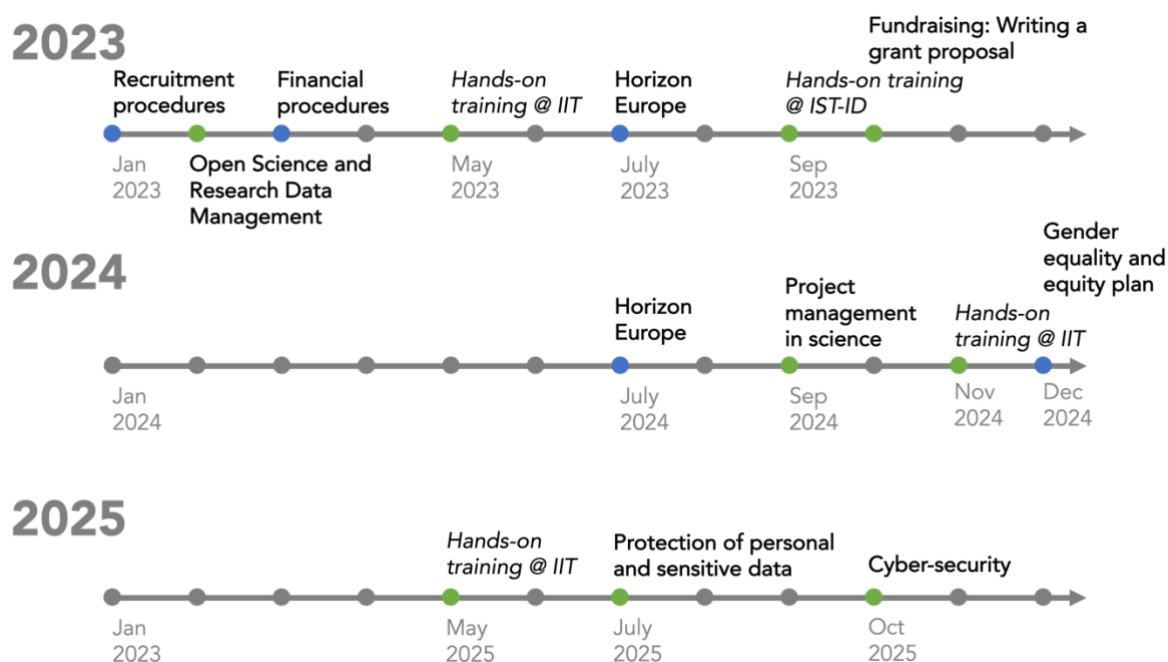


Figure 1. Training timeline for IST-ID staff. Blue-coloured and green-coloured indicate courses offered by IST and IIT, respectively.

6 Conclusion

In this deliverable we defined the Management Training Plan for IST-ID partners within the framework of the DCITIZENS European Project. The plan describes the courses offered by IIT and IST, as well as hands-on activities on Data Management and Project Writing that are offered by IIT in the occasion of the programmed visits by the IST-ID staff. The courses are grouped into six macro areas, from Project and Proposal Management to Career Development and Diversity, and are associated with priority levels, to facilitate the choice by the IST-ID partners of the courses that are most relevant for them. Courses have an indication on the month they are offered in, which was exploited for developing the Training Timeline. The Management Training Plan was designed so that its execution will improve the research management skills of the IST-ID staff, increasing their success rate in funding acquisition and project execution.