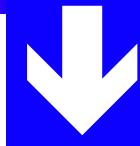


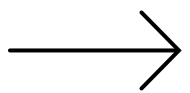
SKILLS AND COMPETENCES



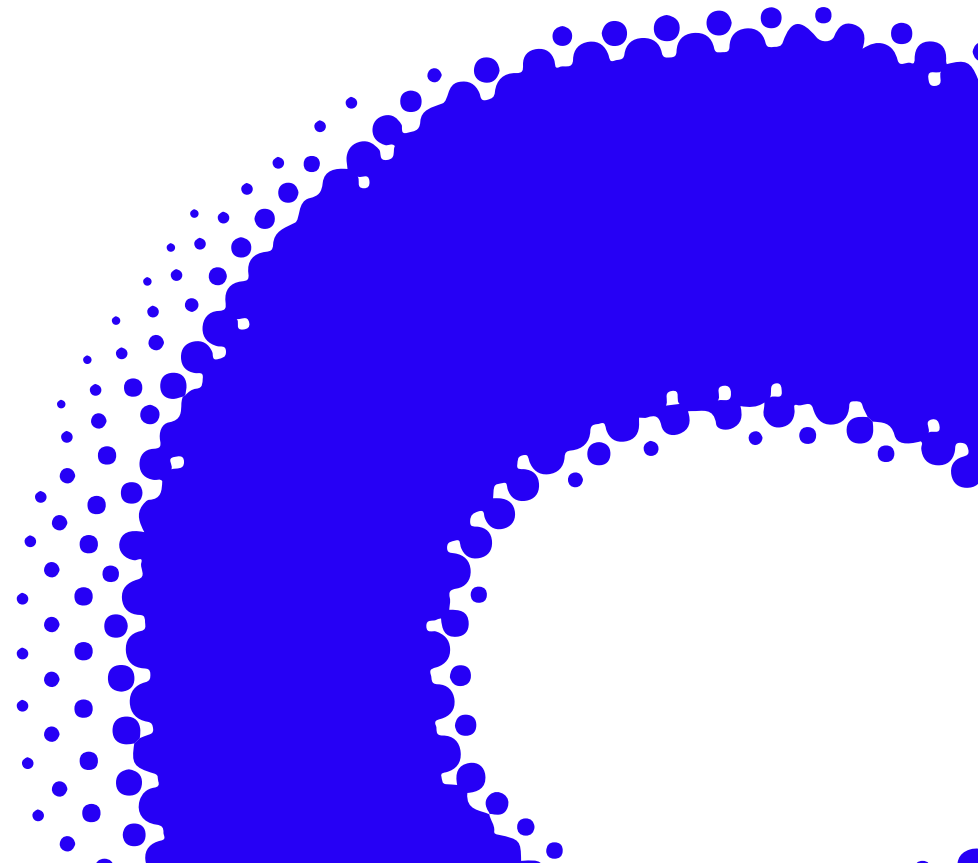
ASSESSMENT
TOOL



for Research
Managers



Produced by the Autonomous University of Barcelona team within the KALEIDOS project, this self-assessment tool supports institutions and individuals in assessing competences related to Knowledge Valorisation and Open Science.



#1_PURPOSE AND CONTEXT

The **KALEIDOS Self-Assessment Tool** for skills and competences for **research managers** is designed as a complementary instrument to the portfolio of competences developed within the KALEIDOS project. It supports both institutional and individual reflection on skills related to Knowledge Valorisation and Open Science.

The tool is designed to enable research managers, Higher Education Institutions and research centres to systematically assess competences related to Knowledge Valorisation and Open Science practices. Its **primary objective is to help identify strengths, areas for development, and priority needs for capacity-building across the three key competence areas** defined in the KALEIDOS framework: collaboration, systemic vision, and impact.

This process is aligned with the KALEIDOS competence framework for Knowledge Valorisation, which was developed through a co-creation process involving actors from the quadruple helix and validated through survey responses and stakeholder engagement.

#2_HOW TO USE THE SELF-ASSESSMENT TOOL

The Self-Assessment process is structured into a sequence of interconnected steps that guide research managers through the evaluation of their competences and the interpretation of results. While the initial steps focus on individual reflection and scoring, the later stages support the identification of development priorities and training needs.

In the following pages you will find a questionnaire divided by each of the KALEIDOS **competence area** (collaboration, systemic vision, and impact). Each dimension includes a specific number of competences: 8 in systemic vision, 6 in collaboration, and 7 in impact.

For each competence, review the four statements and select those that best reflect your current level of practice and experience. **Each statement you select is worth 1 point, meaning:**

0 No knowledge or skills in this competence

1 Foundational level

2 Intermediate level

3 Advanced level

4 Expert level

To **understand your overall level in each area**, you should calculate the average score:

1 Add all your scores for the competences within the same area

2 Divide by the number of competences assessed in that area:

SYSTEMIC VISION 8

COLLABORATION 6

IMPACT 7

3 You will get an overall number by area

4 In each section you will get a text on how to interpret your results

To ensure a meaningful and realistic assessment, it is recommended to complement your self-reflection with feedback from mentors, peers, or supervisors.

#3_QUESTIONNAIRE



SYSTEMIC VISION

LIFE
COMP

+

OTHERS

COLLABORATION + EMPATHY



Which statement best describes your ability to foster collaboration and manage interpersonal dynamics within research teams?

- +1 ☐ **a** ▶ I contribute to team goals and respect others' views, listening to colleagues to maintain a positive working atmosphere.
- +1 ☐ **b** ▶ I independently manage professional relationships and resolve minor conflicts, making an effort to understand diverse perspectives.
- +1 ☐ **c** ▶ I facilitate fair task distribution and foster trust, validating diverse team emotions to negotiate disagreements effectively.
- +1 ☐ **d** ▶ I build systemic frameworks for inclusive collaboration, creating a culture of deep empathy and shared responsibility across the organization.
- ☐ **e** ▶ Not applicable

Which statement best reflects your competence in communicating effectively and being open to feedback and discussion?



COMMUNICATION +
DISCUSSION AND FEEDBACK

- +1 ☐ **a** ▶ I use standard tools to convey clear messages and I am open to discussing my tasks when supervisors provide direct feedback.
- +1 ☐ **b** ▶ I adapt my communication style to different contexts, actively listening to others and engaging in constructive discussions to improve results.
- +1 ☐ **c** ▶ I manage complex team interactions, fostering a safe environment where reciprocity, open debate, and constructive feedback are encouraged.
- +1 ☐ **d** ▶ I design high-level communication strategies that influence stakeholders, embedding a culture of open dialogue and transparency in the organization.
- ☐ **e** ▶ Not applicable

WELLBEING + MANAGING LEARNING



How do you approach your own professional development and the promotion of a sustainable work environment?

- +1 ☐ **a** ▶ I am aware of my learning needs and health risks, participating in training and maintaining basic work-life balance.
- +1 ☐ **b** ▶ I independently plan my learning goals and adopt sustainable habits to manage stress and ensure continuous professional growth.
- +1 ☐ **c** ▶ I support my team's development and wellbeing, connecting learning outcomes to unit performance and offering social support.
- +1 ☐ **d** ▶ I shape institutional policies for wellbeing and lifelong learning, ensuring the long-term sustainability and resilience of the workforce.
- ☐ **e** ▶ Not applicable

RM
COMP

Which statement best describes your ability to solve operational problems and foster innovation within the organization?



PROBLEM SOLVING
+ CREATIVITY

- +1 ☐ **a** ▶ I use established methodologies to break down routine issues and propose basic solutions to daily management challenges.
- +1 ☐ **b** ▶ I experiment with new ideas to solve unexpected issues, identifying root causes and assessing risks to improve unit efficiency.
- +1 ☐ **c** ▶ I cultivate a solution-oriented culture in my team, challenging outdated methods to address interconnected organizational challenges.
- +1 ☐ **d** ▶ I design comprehensive strategies to address systemic issues, creating novel policies that drive long-lasting organizational innovation.
- ☐ **e** ▶ Not applicable

CRITICAL THINKING + DECISION MAKING



Which statement best reflects your competence in making high-stakes decisions and analyzing risks?

- +1 ☐ **a** ▶ I gather relevant info and consider diverse perspectives to make routine administrative decisions based on basic risk principles.
- +1 ☐ **b** ▶ I critically analyze multiple scenarios and data sources to mitigate risks and ensure a unified decision-making approach.
- +1 ☐ **c** ▶ I use complex data to navigate ambiguity, assessing potential impacts and advising senior management on critical choices.
- +1 ☐ **d** ▶ I provide thought leadership to shape strategy, introducing innovative decision models to achieve long-term organizational objectives.
- ☐ **e** ▶ Not applicable

How do you approach cultural diversity and inclusivity within international collaborations?



CULTURAL INTELLIGENCE

- +1 ☐ **a** ▶ I communicate respectfully with immediate collaborators, demonstrating fundamental awareness of cultural differences and customs.
- +1 ☐ **b** ▶ I adapt my communication style to navigate cultural norms, addressing unintended behaviors while working with diverse teams.
- +1 ☐ **c** ▶ I establish inclusive procedures and manage cross-cultural conflicts to foster a diverse environment in partner consortiums.
- +1 ☐ **d** ▶ I develop organizational strategies for cultural sensitivity, positioning the institution to lead complex international collaborations.
- ☐ **e** ▶ Not applicable

STRATEGIC PLANNING

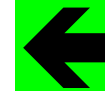


Which statement best describes your ability to align research plans with broader organizational goals?

- +1 ☐ **a** ▶ I conduct basic analyses to ensure my project resources align with current organizational strategies.
- +1 ☐ **b** ▶ I implement procedures to increase research impact, utilizing networks to align my projects with broader national strategies.
- +1 ☐ **c** ▶ I formulate forward-thinking initiatives, engaging stakeholders to anticipate challenges and maximize strategic research value.
- +1 ☐ **d** ▶ I guide the organization through complex decisions, developing agile plans that integrate global trends to drive institutional success.
- ☐ **e** ▶ Not applicable

GREEN
COMP

Which statement best describes your ability to analyze complex systems and formulate challenges to identify suitable solutions?



**SYSTEMS THINKING +
PROBLEM FRAMING**

- +1 ☐ **a** ▶ I identify obvious sustainability issues in my immediate work environment and report them to ensure compliance with basic environmental standards.
- +1 ☐ **b** ▶ I analyze sustainability factors within my specific project's scope, independently formulating challenges to identify stakeholders and appropriate mitigation approaches.
- +1 ☐ **c** ▶ I guide the team to frame complex problems correctly, helping them understand the interconnectedness of environmental, social, and economic factors in our research.
- +1 ☐ **d** ▶ I apply a holistic approach to socio-ecological systems, analyzing interactions across time and space to drive systemic transformation and long-term sustainability.
- ☐ **e** ▶ Not applicable

COLLABORATION

LIFE
COMP

FLEXIBILITY AND EMPATHY



Which statement best describes your ability to adjust operational plans during transitions and manage the wellbeing of the staff?

- +1 ☐ **a** ▶ I follow established change-management procedures when priorities shift, listening to colleagues' concerns to maintain team stability.
- +1 ☐ **b** ▶ I independently reallocate resources and adjust schedules to meet changing requirements, proactively addressing staff needs to prevent burnout.
- +1 ☐ **c** ▶ I lead the unit through operational restructuring and uncertainty, mediating conflicts and ensuring that the team's morale and values are protected.
- +1 ☐ **d** ▶ I design institutional strategies for agility and change management, embedding a culture of psychological safety and resilience across the organization.
- ☐ **e** ▶ Not applicable

RM
COMP

Which statement best describes your ability to negotiate agreements and manage strategic relationships with stakeholders?



**BUILDING RELATIONSHIPS + TRUST +
BUSSINESS LIAISON + DIPLOMACY**

- +1 ☐ **a** ▶ I communicate clearly with partners to deliver on commitments and use basic active listening to address conflicts and maintain trust.
- +1 ☐ **b** ▶ I independently negotiate agreements and resolve conflicts to preserve trust, implementing risk mitigation strategies with diverse stakeholders.
- +1 ☐ **c** ▶ I facilitate cross-sector collaborations and navigate complex negotiations, aligning conflicting interests to achieve mutually beneficial outcomes.
- +1 ☐ **d** ▶ I develop national and international engagement strategies, negotiating high-level agreements and power dynamics that secure institutional success.
- ☐ **e** ▶ Not applicable

**PEOPLE MANAGEMENT +
TEAM BUILDING**



Which statement best reflects your competence in organizing the team to ensure high performance and successful project execution?

- +1 ☐ **a** ▶ I set clear goals for the team and monitor basic performance metrics, ensuring tasks are distributed fairly and completed on time.
- +1 ☐ **b** ▶ I manage staff resources and workflows independently to meet deliverables, addressing operational conflicts to maintain productivity.
- +1 ☐ **c** ▶ I align team goals with organizational strategy, using performance analytics to track progress and empower members to take ownership of results.
- +1 ☐ **d** ▶ I design organizational structures and workflow strategies that maximize output, creating a high-performance culture across multinational contexts.
- ☐ **e** ▶ Not applicable

How do you approach the professional development of staff and the promotion of an inclusive, adaptive culture?



**COACHING SKILLS + ADAPTABILITY
+ EDI + HANDLING DIFFICULT
CONVERSATIONS**

- +1 ☐ **a** ▶ I provide constructive feedback and treat colleagues with respect, adapting to changes and understanding basic concepts of diversity and inclusion.
- +1 ☐ **b** ▶ I apply coaching models to help members set development goals, implementing inclusive practices to foster a respectful and adaptive environment.
- +1 ☐ **c** ▶ I lead diverse teams through transitions with empathy, developing coaching plans and managing sensitive discussions to mitigate bias.
- +1 ☐ **d** ▶ I drive the institutional talent strategy, championing systemic coaching frameworks and embedding EDI initiatives into the organization's DNA.
- ☐ **e** ▶ Not applicable



OTHERS

+

GREEN
COMP

**PATIENCE + IMPARTIALITY
+ ASSERTIVENESS**



Which statement best describes your ability to remain patient, impartial, and assertive when managing conflicts or high-pressure situations?

- +1 ☐ **a** ▶ I listen patiently to different sides of a disagreement without taking sides immediately, and I can state my own position clearly when asked.
- +1 ☐ **b** ▶ I remain calm under pressure and objectively analyze facts to resolve disputes, asserting the necessary rules or decisions to keep the project on track.
- +1 ☐ **c** ▶ I mediate complex team conflicts with impartiality, validating feelings while firmly addressing unacceptable behavior to ensure a fair resolution.
- +1 ☐ **d** ▶ I embed a culture of psychological safety and fairness, creating institutional mechanisms that ensure objective decision-making and respectful, assertive communication.
- ☐ **e** ▶ Not applicable

Which statement best reflects your competence in driving innovation, managing transitions, and making decisions in the face of uncertainty and risk?



**TRANSFORMATIVE
INNOVATION + ADAPTABILITY**

- +1 ☐ **a** ▶ I support organizational changes and adapt my workflow to new innovative tools, understanding the need to manage transitions in my daily tasks.
- +1 ☐ **b** ▶ I independently identify outdated processes and propose solutions to navigate uncertainty, making decisions to manage risks within my project's scope.
- +1 ☐ **c** ▶ I lead the team through complex transitions and ambiguity, encouraging innovation to solve challenges and ensuring the group adapts to changing contexts.
- +1 ☐ **d** ▶ I architect the institution's transformation strategy, making high-stakes decisions related to the future to ensure sustainability in the face of systemic uncertainty.
- ☐ **e** ▶ Not applicable

IMPACT



OUTREACH + COMMUNICATION + COMMUNITY + TRAINING



Which statement best reflects your competence in leading research communication, community engagement, and building outreach capacity?

- +1 ☐ **a** ▶ I support engagement efforts by organizing event logistics, drafting basic content for communication channels, and assisting in the coordination of training workshops.
- +1 ☐ **b** ▶ I manage integrated communication plans and community projects, tailoring messages for diverse audiences and providing specific guidance to researchers on outreach techniques.
- +1 ☐ **c** ▶ I lead the unit's engagement strategy and design training programs to upskill researchers, coordinating complex portfolios and ensuring bidirectional communication with society.
- +1 ☐ **d** ▶ I architect the institutional vision for societal impact, embedding engagement training into professional development, and influencing policy to drive a culture of open science.
- ☐ **e** ▶ Not applicable

Which statement best reflects your competence in cultivating strategic relationships with academic partners, policymakers, and industry stakeholders?



ACADEMIC COLLABORATION + KEY STAKEHOLDERS

- +1 ☐ **a** ▶ I maintain stakeholder databases and support the team by scheduling meetings, handling correspondence with partners, and ensuring logistical compliance for visits.
- +1 ☐ **b** ▶ I independently manage relationships with key partners, negotiating mutual interests for specific collaborations and resolving conflicts to ensure project alignment.
- +1 ☐ **c** ▶ I lead cross-functional partnership strategies, leveraging data to optimize stakeholder networks and designing frameworks that align external alliances with organizational goals.
- +1 ☐ **d** ▶ I drive transformative impact by building high-level ecosystems and legacy networks, shaping the research agenda through sustained influence on national and international policy.
- ☐ **e** ▶ Not applicable

MONITORING AND EVALUATION



Which statement best reflects your competence in designing and administering M&E frameworks for research?

- +1 ☐ **a** ▶ I assist in data collection by using established methods to track project inputs and support the team by ensuring basic indicators are recorded and filed accurately.
- +1 ☐ **b** ▶ I independently select and refine relevant indicators for specific projects, managing the data collection plan and implementing quality assurance measures.
- +1 ☐ **c** ▶ I lead the design of comprehensive M&E plans for complex programs, coordinating stakeholder input to align results-based management approaches with project outcomes.
- +1 ☐ **d** ▶ I architect the institutional assessment strategy and build organizational capacity, applying sophisticated methodologies to measure long-term impact and guide policy.
- ☐ **e** ▶ Not applicable

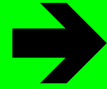
Which statement best reflects your competence in managing knowledge valorisation and technology transfer?



TECHNOLOGY TRANSFER

- +1 ☐ **a** ▶ I support the process by documenting IP records, maintaining administrative files on patents or copyrights, and tracking the timeline of transfer activities.
- +1 ☐ **b** ▶ I evaluate the commercial potential of specific technologies, negotiating licensing agreements and managing the lifecycle of transfer projects with industry partners.
- +1 ☐ **c** ▶ I lead the strategic planning for portfolio commercialisation, managing complex legal risks and advising on market feasibility to optimize the value of assets.
- +1 ☐ **d** ▶ I build comprehensive innovation ecosystems and shape national policies on commercialisation, driving the long-term economic and societal impact of the organization's IP.
- ☐ **e** ▶ Not applicable

**COLLECTIVE ACTION +
INDIVIDUAL INITIATIVE**



Which statement best reflects your competence in initiating change and leading collective action for sustainability?

- +1 ☐ **a** ▶ I contribute to change by following sustainability protocols, participating in team initiatives, and identifying simple improvements in my daily administrative tasks.
- +1 ☐ **b** ▶ I independently launch initiatives to improve project sustainability and manage collaborative task forces, identifying potential areas for operational optimization.
- +1 ☐ **c** ▶ I lead the unit's transition towards sustainable practices, empowering the team to take initiative and coordinating alliances to drive collective impact.
- +1 ☐ **d** ▶ I architect the institutional vision for sustainability and social impact, building global coalitions and transforming the organizational culture to be an agent of change.
- ☐ **e** ▶ Not applicable

Which statement best reflects your competence in leveraging digital technologies for communication, sharing, and co-creation?



**INTERACTION + COLLABORATION +
SHARE THROUGH TECHNOLOGIES**

- +1 ☐ **a** ▶ I use established digital tools to communicate updates, share files following basic attribution rules, and contribute to collaborative documents as directed by the team.
- +1 ☐ **b** ▶ I independently manage project-specific digital environments, selecting the right tools for co-creation and acting as an intermediary to ensure data is shared correctly.
- +1 ☐ **c** ▶ I lead the adoption of advanced collaborative platforms, guiding staff on appropriate digital behaviors and optimizing workflows for complex data sharing and interaction.
- +1 ☐ **d** ▶ I architect the organization's digital collaboration strategy, solving complex interoperability problems and defining new standards for knowledge co-creation in the field.
- ☐ **e** ▶ Not applicable

**MANAGING
LEARNING**

Which statement best reflects your competence in managing your own learning and professional development?

- +1 ☐ **a** ▶ I demonstrate awareness of my immediate learning needs and support my own development by participating in required training to address specific gaps in my daily tasks.
- +1 ☐ **b** ▶ I independently plan and implement my learning goals, actively seeking specific resources and strategies to acquire the skills needed for my projects.
- +1 ☐ **c** ▶ I critically reflect on my learning processes and outcomes, assessing how they impact my work and establishing knowledge relationships across different domains.
- +1 ☐ **d** ▶ I architect my long-term professional identity and development strategy, turning personal learning into institutional knowledge and driving a culture of continuous improvement.
- ☐ **e** ▶ Not applicable

SYSTEMIC VISION

TOTAL		COLLABORATION + EMPATHY
TOTAL		COMMUNICATION + DISCUSSION AND FEEDBACK
TOTAL		WELLBEING + MANAGING LEARNING
TOTAL		PROBLEM SOLVING + CREATIVITY
TOTAL		CRITICAL THINKING + DECISION MAKING
TOTAL		CULTURAL INTELLIGENCE
TOTAL		STRATEGIC PLANNING
TOTAL		SYSTEMS THINKING + PROBLEM FRAMING

TOTAL / **8**

IMPACT

TOTAL		OUTREACH + COMMUNICATION + COMMUNITY + TRAINING
TOTAL		ACADEMIC COLLABORATION + KEY STAKEHOLDERS
TOTAL		MONITORING AND EVALUATION
TOTAL		TECHNOLOGY TRANSFER
TOTAL		COLLECTIVE ACTION + INDIVIDUAL INITIATIVE
TOTAL		INTERACTION + COLLABORATION + SHARE THROUGH TECHNOLOGIES
TOTAL		MANAGING LEARNING

TOTAL / **7**

COLLABORATION

TOTAL		FLEXIBILITY AND EMPATHY
TOTAL		BUILDING RELATIONSHIPS + TRUST + BUSSINESS LIAISON + DIPLOMACY
TOTAL		PEOPLE MANAGEMENT + TEAM BUILDING
TOTAL		COACHING SKILLS +ADAPTABILITY + EDI + HANDLING DIFFICULT CONVERSATIONS
TOTAL		PATIENCE + IMPARTIALITY + ASSERTIVENESS
TOTAL		TRANSFORMATIVE INNOVATION + ADAPTABILITY

TOTAL / **6**

**It is time to calculate your score:*

1. Transfer the results from your previous pages and add the number of points for each competence.

2. Add the total of points.

3. You can then divide the final score by:

8 for systemic vision

6 for collaboration

7 for impact

#4_ INTERPRETATION OF RESULTS AND IDENTIFICATION OF TRAINING NEEDS

Once you have completed the self-assessment, your scores will help you identify priority areas for development across the three KALEIDOS competence areas: collaboration, systemic vision, and impact.

As a general guideline:

♦ SCORES OF 0–1 (NO KNOWLEDGE / FOUNDATIONAL)

→ These are high-priority areas for training.

You may need structured learning, guidance, and practical experience to build these competences.

♦ SCORE OF 2 (INTERMEDIATE)

→ This indicates a moderate priority.

You have some experience, but further development will help you apply the competence more confidently and in more complex contexts.

♦ SCORES OF 3–4 (ADVANCED / EXPERT)

→ These are strength areas.

You can continue refining these competences and potentially support or mentor others.

#5_ USE OF RESULTS AT INDIVIDUAL AND INSTITUTIONAL LEVEL

◆ INDIVIDUAL PERSPECTIVE (RESEARCHER MANAGERS)

You have evaluated your knowledge, skills, and abilities across the key competence areas of collaboration, systemic vision, and impact. This process allows you to identify your strengths and areas for development, as well as to define priorities and timelines for learning. Based on these results, you can carry out a personal training needs analysis and design a targeted development plan aligned with your career goals and your engagement in Knowledge Valorisation and Open Science.

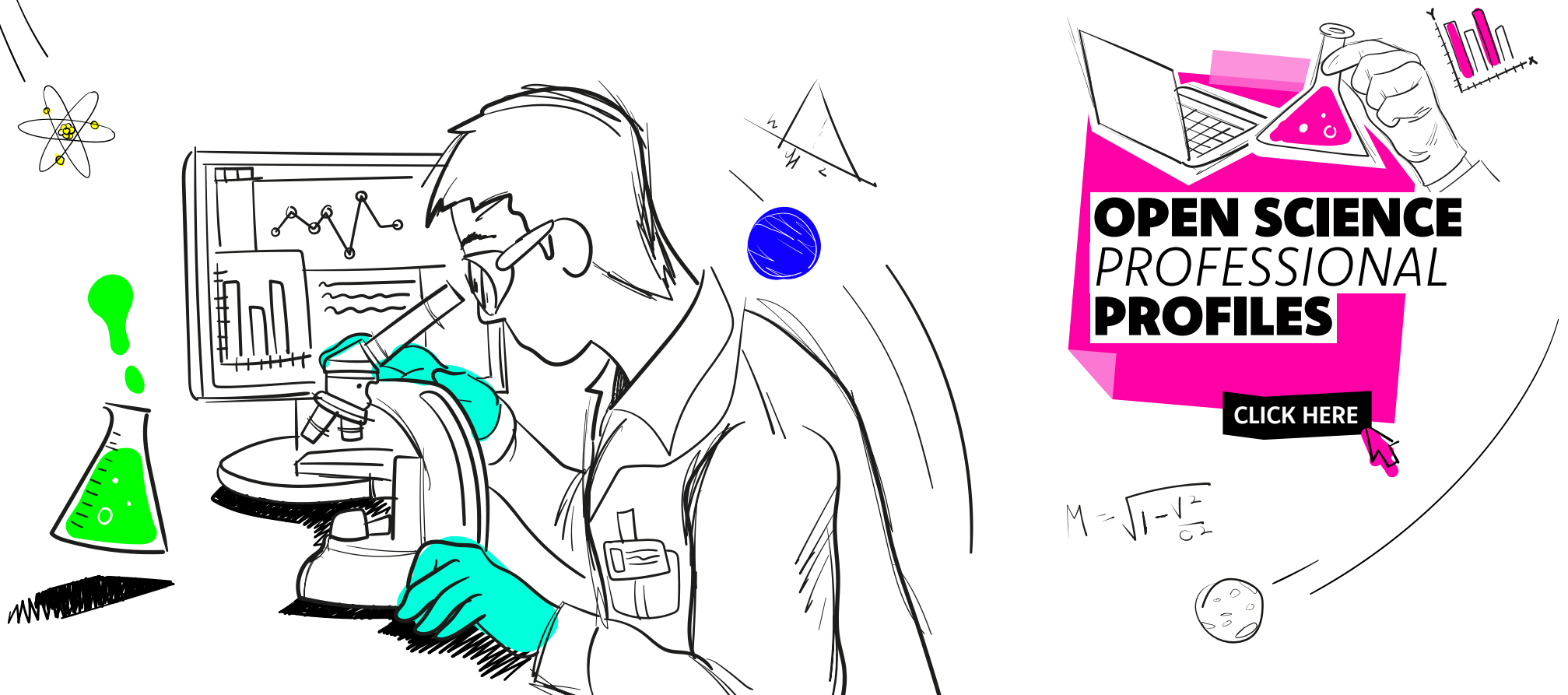
◆ INSTITUTIONAL PERSPECTIVE (HEIS AND RESEARCH CENTRES)

Aggregated results from the self-assessment provide valuable insights into the overall competence levels within the organisation. Institutions can identify common strengths and gaps, assess the alignment of existing training provision with the KALEIDOS competence framework, and prioritise areas for capacity-building. This enables the development of more strategic, evidence-based training programmes and supports institutional efforts to strengthen Knowledge Valorisation practices.

#6 *LEARN MORE ABOUT THE* **OPEN SCIENCE PROFESSIONAL PROFILES**

The KALEIDOS project team carried out a survey with quadruple helix stakeholders to identify the skills and competences needed to put **Open Science** into practice within innovation ecosystems. The analysis is part of the deliverable “Professional skills and competences for researchers, managers and advisors to implement an open science–based innovation management”, developed by the Autonomous University of Barcelona.

To dive into the different profiles for Researcher and Research Managers, visit the **Open Science Professional Profiles** website or read the deliverable at our Zenodo space: <https://zenodo.org/records/17737923>





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