



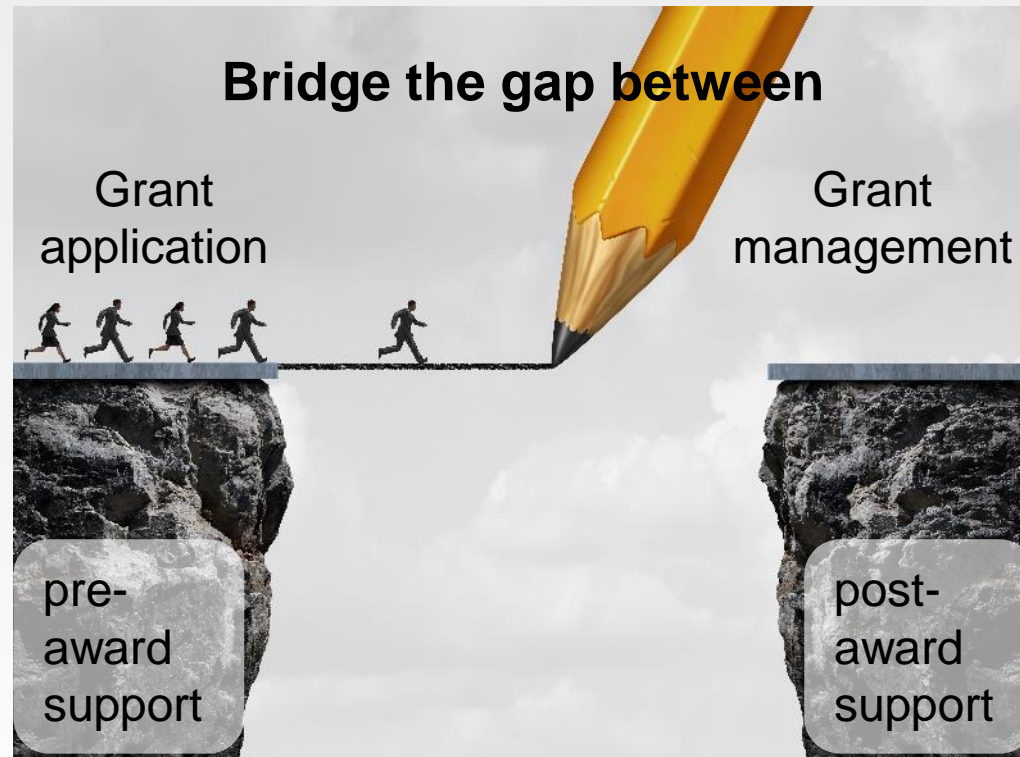
Project Management of Collaborative Research Projects

From Grant Application to Implementation
(Focus: coordinators of EU H2020 RIA)





Efficient implementation is essential for the scientific and financial success of a project.





Past experience has shown us that what may give a high score in evaluation, may actually cause a lot of headache for project implementation.

Grant application



Grant management



Pre-award advisors need to take more responsibility for post-award duties.



Project management

- Financial management
- Scientific project management
- Data (+IPR) management
- Communication, Dissemination and Exploitation (+IPR) management





Financial management

- Financial management is crucial. As coordinator, ensure to have an expert in EU FP funding schemes, preferably *in-house*, or eventually as partner (c. 20% position*)

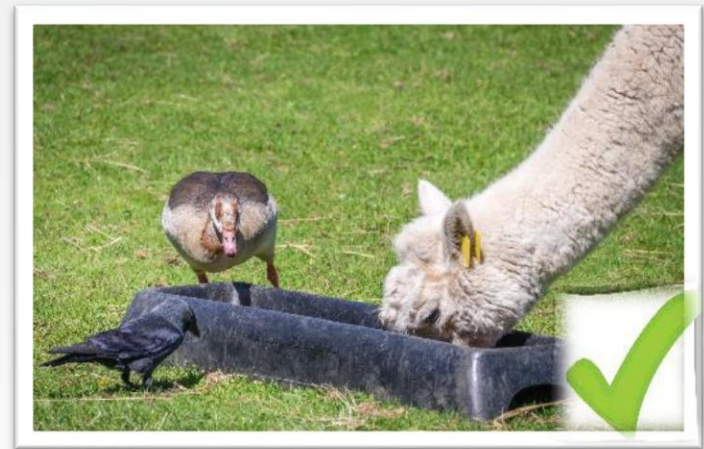
** Depending on project size and complexity*

- As much as possible, to ensure continuity between pre- and post-award: economist helping with proposal = project financial manager.



Financial management

Partners and budget distribution: many partners with very different budget allocation can be more challenging to manage. However, do not aim for an equal distribution among partners, but rather for a distribution that makes most sense.



A good budget distribution reflects clearly **who** is doing **what**, why «**who**» is best fitted to do «**what**», and how much «**what**» costs (Chapter 3.3-consortium as a whole and 3.4-use of resources, and also 4.1-partner description and 4.2-third parties).



Scientific Project management

- Dedicate sufficient time to management of the project (4-7% of the total project budget??).
- If large (>25 partners) and interdisciplinary project, and/or with >5 partners new to EU funding schemes, consider recruiting a full-time project manager.
- Delegate management across the consortium, *e.g.*, tasks and responsibilities involving quality control can be decentralized to work package leaders.



Scientific Project Management

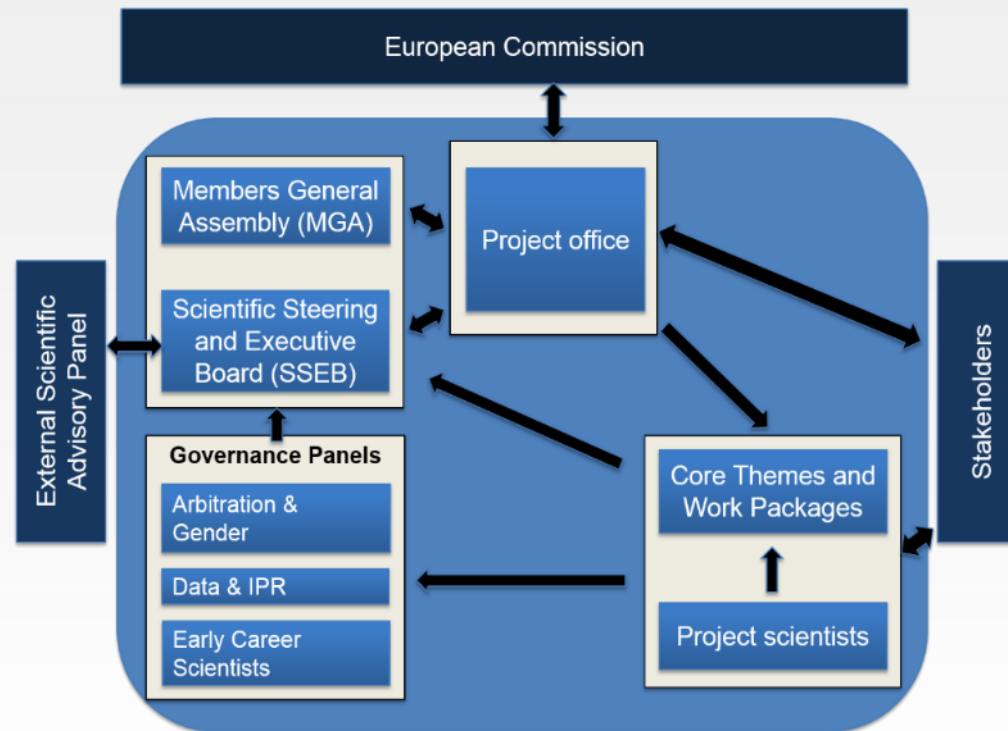
- Plan project management in parallel: on operative level (WP description) and strategic level (Chapter 3.2 Management structure and procedures).
- Use simple, straightforward management structures with clearly defined roles and responsibilities throughout the project.
- Roles and responsibilities should be given based on proven competencies for the role, not because of status or hierarchical reasons.





Scientific Project Management

- Base yourself on the **DESCA Model Consortium Agreement for H2020** but remember to keep it adapted to your project.





Scientific Project management

Deliverables - *“distinct output of the project, meaningful in terms of the project's overall objectives and constituted by a report, a document, a technical diagram, a software etc”*

- Amount: keep to a strict minimum WHILE ensuring all key deliverables are listed: tangible product proving achievement of objectives or highlighting results from key research questions; relevant and interesting.
- Amount: consider the content of each deliverable: do they overlap? Should one deliverable be divided into several over the project lifetime?
- Consider Type and Confidentiality level



Scientific Project Management

Deliverables continued

- Responsibility: agree WHO is responsible for each deliverable. Each WP should contribute to at least 1 deliverable, to enable monitoring progress.
- Timing: deadlines spread evenly over entire project duration. Shortcoming in evaluation: you may have to present progress reports (in addition to the compulsory periodic reports) if there are too few deliverables within one reporting period.
- Avoid accumulation close to reporting period deadlines and project end, because busy times AND and very difficult to postpone a late deliverable to next period)





Scientific Project Management

Deliverables (continued)

- Timing: not too close to project start if dependent on staff to be recruited
- Timing: be realistic with respect to partner's experience with this kind of work, partner's other duties in the project, dependencies on other deliverables...
- Recommendation for timing: plan "safe" deliverables in reporting period 1, or towards middle/end of reporting period 2 and 3. Plan more risky deliverables at beginning of reporting period 2 or 3.



Scientific Project Management

Milestones

- Include definitions for task, milestone, deliverable in instructions for WP table preparation for WP leaders
- Check if milestones are actually milestones and not deliverables or tasks
- Check that they actually are useful control points for project implementation
- Check that their achievement can be verified.





Scientific Project Management

Other considerations

- Realistic estimates for management costs: management person-months, but also meeting and travel costs.
- Budget for some “imposed” meetings: review meetings in Brussels, clustering with other projects or showcasing project at EU-organised events.





Scientific Project management

Other considerations

- Make sure that you and partners have sufficient staff present with respect to the timing of their tasks and deliverables. Get detailed information from HR how long it will take to hire staff.
- Try to avoid reporting deadlines during holiday periods, or field work involving many partners.
- Ethics workpackage: can be imposed with imposed deliverables. Prepare well at proposal stage already.



Data management

- FAIR principle now mandatory for all EU projects! Concept for data management is evaluated! You have to deliver a DMP soon after project start.
- Reserve budget (2-4% of total??). Plan data management in parallel on operative level (WP) and strategic level (chapter 2.2 a Dissemination and Exploitation, Chapter 3.2 management structures)
- Assign a data manager – continuity pre-post award!
- Share and discuss data management plans with the consortium





CDE Management

- Reserve budget (2-3% of total?? More if dissemination/exploitation is within scope of call or serves expected impact).
- Plan communication and exploitation in parallel on operative level (WP) and strategic level (chapter 2.2 a Dissemination and Exploitation, 2.2. b Communication, 3.2 Management structure and procedures)
- Assign a communication/exploitation manager- continuity pre-post award!
- Share and discuss plans with the consortium, to ensure responsibilities are well shared.



Thank you for your attention!



All images used in this presentation were taken or adapted from: Colourbox.com

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