

Project Implementation

Day 2: 18 November, 2008, Puebla, Puebla

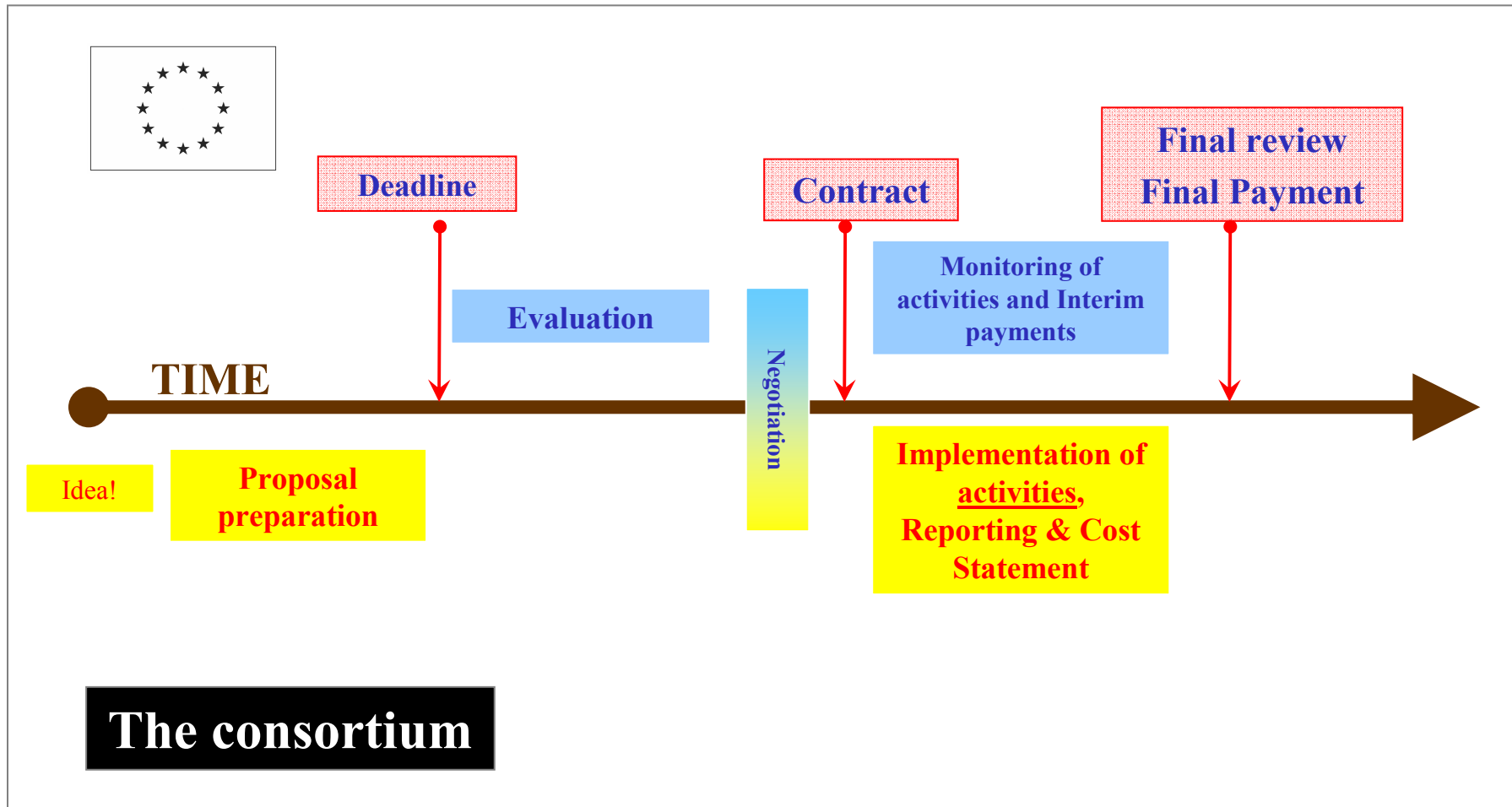


Leonardo Piccinetti

18th November 2008



Project timeline



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Project Implementation

- **The consortium**
- **How to work with the European Commission**
- **Deadline and deliverables in FP7 grants**
- **Hints and tips of a good communication plan**

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The consortium

- **The players in the FP7 projects**
- **Roles of the different partners**
- **Potential conflicts in a consortium**
- **The Consortium Agreement**
- **The Scientists and Administrators**

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The players in the FP7 projects

- ***European Commission***
 - **Scientific (or Project) officer**
 - **Financial officer**
- ***Scientific Coordinator***
- ***Project Manager / Administrator***

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Concerns

	Accademics	Large Companies	SME	Project Officer
Time scale	5-10 years	5-10 years	Weeks/Months	Project duration
General	Best Science	Best technology	Solution	EU Policy
Immediate	Publishing , deadlines, next project	Best partners, paperwork, deadlines	Cash , The client	Paperwork, deadlines
Biggest fear	Peer failure	Red falg from EU	Confidentiality	Contractual problems

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Quotation : Choice of Coordinator

● **Source : Negotiation Guidelines**

www.cordis.lu/fp6/find-doc.htm (page 6)

“The proposers will identify , from amongst themselves, the organisations and the person that will act as their coordinator and propose this to the Commission”

“The choice of coordinator should therefore take into account its management and legal and financial stability. The Commission may object to the choice of the proposers in such grounds”

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Profile of Scientific Coordinator

Science

Excellence in Science

Excellence in Communicating Science

Vision strategy for Scientific Area

Framework Skills

Understand the European Commission

Understand EU research Policy

Diplomatic Skills

How to motivate researchers

How to predict/solve conflicts and disputes

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The project Manager's agenda

● Contractual issues

- Deliverable and deadlines (reports, ect)
- Milestones (Annual reviews, mid-term reviews, final reviews)

● Financial issues

- Certificates + Audits by European Commission
- Management Justification of Costs

● Legal issues

- Model Grants Agreement , IPR, Consortium Agreement , Change of Consortium

● Management issues

- Workflow/scheduling , change control procedure, conflicts, reporting , dissemination

● Political issues

- Exploitation of results , gender equality, ethics, safety,

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Rules of subcontracts

- **Subcontractor paid 100% commercial costs**
- **Subcontractor is NOT partner in the project**
- **Subcontract clearly identify in the Technical Annex**
- **No-Core element of the work**
- **Competitive tender process (best price/quality)**
- **IPR belong to consortium/Commission**
- **Conditions of EC grants applicable to Subcontractor**

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EC projects officers (legal and financial rules)

- First of all they are not help you in the project
- **What they love ?**
 - Paperwork exactly as requested
 - Researchers understanding/accepting bureaucracy
 - Success stories
- **What they hate?**
 - Problems without solutions
 - Surprises
- **What they fear?**
 - Delays
 - Contractual problems

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Some FP7 project lingo...

Grant Agreement	The contract between EC and the consortium
Technical Annex (TA)	Technical annex to the grant agreement = DoW
Description of Work (DoW)	= Technical Annex
Reporting Periods	Official reporting periods
Periodic Reporting	Activity and Management (financial) report (= 1 year)

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Some FP7 project lingo... (2)

Activity Report	Report on project <u>activities</u> , progress, deviations, etc.
Management Report	<u>FINANCIAL</u> report: correlation of activities and cost statement
Cost Statement	<ol style="list-style-type: none">1. <u>"FORM C"</u> official signed2. <u>Cost Budget follow up</u>3. <u>Person-month status</u>
Interim Report	Non-official, typically amid of Reporting Period

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Payments from the EC

- Made to coordinator who distributes to partners (*"tranches"*)
- **Advance Payment** (45 days from signature)
 - *160% of Year 1 allocation*
- **Interim Payments** after each Cost Statement
 - **Final Payment**
 - 5% Guarantee Fund retained by EC

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Ensuring good project implementation

- Make sure your TA is a **usable implementation and project management** tool
 - Assign clear responsibilities and budget
 - Do not hope for partners to do their work, tell them
- Make sure all partners understand the TA and agree to their involvement
- **Kick-off meeting** must be an effective and productive first working session... as well as breaking the ice

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Project Management tips

- **Keep regular communication**
(really!)
- Use Interim Reports to prepare in advance for Periodic Reporting
- Reporting takes time: template, contributions, consolidation, originals!
- Be flexible and helpful but strict
 - PM software tools ?

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Principles of coordination

- Coordination of a European project must not be underestimated (expensive, time consuming)
- The project coordinator must be very careful in selecting **instrument**, drawing the **budget**, composing the **consortium**...
- The coordinator must establish **contacts with EC**: saves time and precious information!
- Organisations having no prior experience in coordination are encouraged to get **expert advice and services.**

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The role of partner

- As a **first experience**, it is advisable to join a consortium as partner
- Bring a **specific competence** into a consortium
- **Not necessarily** a “research” role: testing, user role, etc...
- Read partner searches, talk to NCP...
 - EC info-days (live or web cast)

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Entering a consortium

When asked to enter a consortium

- Beware of **budget inadequacy**
- Understand **IPR** management
- Must be **flexible**: *either to fit consortium requirements, or to accommodate an offer into a consortium.*

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The Communication & dissemination plan

M3

0.5 -1 mm

- Brief introduction

PROJECT COMMUNICATION OBJECTIVES

- Communication needs
- Communication strategy
- Which are the messages to be disseminated?
- Which are the results to be reached through communication actions?

THE TARGETS

- The TARGET AUDIENCE
- The TARGET MEDIA (divided per sector and per countries involved)
- Reaching the target

COMMUNICATION ACTIONS

- Press Office – Online Press Office
- Communication tools and actions for the target media
- Communication tools and activities for the target audience
- Organisation of events and participation at conferences

EVALUATION OF THE RESULTS

TIME FRAME

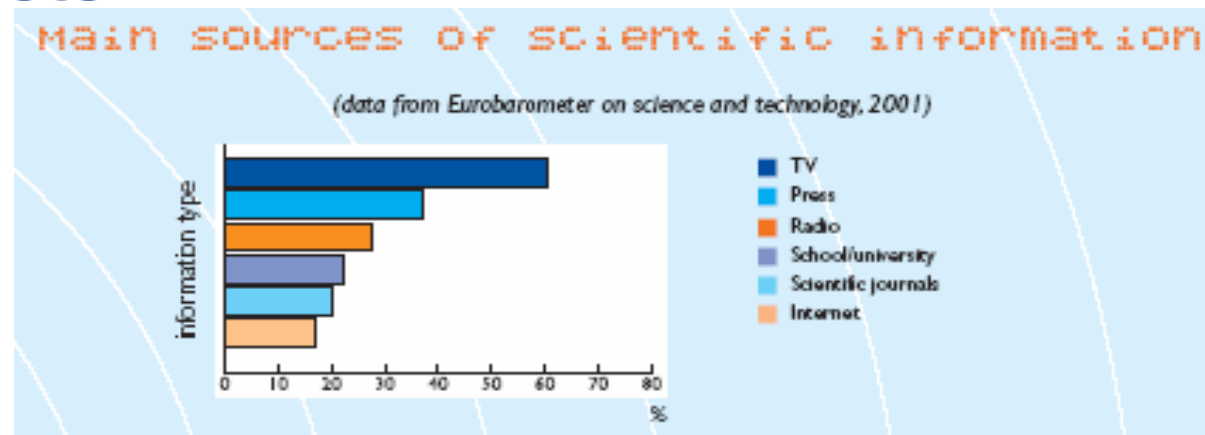
- Events already foreseen
- Procedure and time frame
- Indicative plan for all the activities (GANTT CHART)

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Hints and tips of a good communication plan

- Defining key messages
- Establishing target audiences
- Establishing target media
- Selecting the appropriate modes of communication
- Tailoring information to the intended outlets



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Hints and tips of a good communication action

- **Building good relationships with the media**
- **Maximising the exposure of messages**
- **Tapping useful Commission and other external resources**
- **Evaluating results**

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Start up the communication activities

- **Define a corporate identity of the project** **M 2**
 - **Logo (b/w, easy to use and remember, with reference to EU gives more value)**
- **Organise the website** **M 3**
 - **Define the needs and the audience**
 - **Define a structure**
 - **Clear messages and easy structure**
 - **Public and private areas**
 - **Logo of the EU + FP6/FP7**
 - **Forum / database**
 - **Exploitation (media and web, research website, Cordis, Athena, EurActiv, IST Results)**

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"Learning from practical experiences "
FP7 Training Workshop



Thank you!

Leonardo Piccinetti

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