

D.2.6 - Adaptation of content for on-line use (text only) ready to be fed into the PRO-IDEAL platform

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1. Introduction

D.2.6 documents the on-line versions of training and coaching courses. According to Annex 1, these courses were conceived as follows:

Task 2.1 Definition of Coaching Courses content (1): Creation of "information templates" for the different strategic objectives of the ICT programme that can be easily amended, specified and fine-tuned following EU Info Days and calls' specifications (INMARK, EMF); these .ppt and text templates serve the information diffusion for the awareness raising activities in the target countries.

Task 2.2 Definition of Coaching Courses content (2): Creation of "interactive" coaching courses for trainers/Coaches themselves, that will include (but are not limited to):

- How to understand "Eurojargon"? (EMF)
- EU funding mechanisms, instruments and administrative requirements (INMARK)
- Project idea questionnaire and assessment criteria (EMF)
- Steps to a good and successful proposal (including success factors and templates) (INMARK, EMF)
- How to manage an international consortium? (INMARK)

Task 2.3 Definition of Coaching Courses content (3): Creation of "interactive" introductory coaching courses for potential partners that may include:

- How do European projects work? (INMARK)
- Where can I have my project idea analysed? (EMF)
- Where can I find partners? Where do consortia find me? (INMARK, EMF together with Ideal-ist project representative)
- Steps to a good and successful proposal (INMARK, EMF)

Finally, Task 2.4 foresees the adaptation of the content of T2.1 to T2.3 for on-line courses in Blog format.

2. Implementation

INMARK and EMF carried out tasks 2.1 to 2.3 in close collaboration. This resulted in the design of awareness raising and coaching courses content structure (D2.1), that serves as basis for the organization of PRO-IDEAL events. The initial structure can be customized locally as required (in Argentina, Brazil, Chile and Uruguay, and in Colombia). Other materials supporting the PRO-IDEAL events are templates (.ppt) for modules' presentations on the occasion of the events in the target countries (D2.2), and coaching modules for trainers/coaches self-learning and potential project participants (D2.3 & D2.4). All modules were adapted for on-line use and can be found at: www.pro-ideal.eu/training and www.pro-ideal.eu/projectangels respectively.

With regard to task 2.4 "Adaptation of content for on-line use in Blog format", feed-back from users and potential Project Angels has shown that the format of a blog does not correspond to the expectations and skills of the target groups. Thus, it has been agreed to adapt the .ppt modules and put them on-line as information source rather than communication tool. To allow for information exchange, a Project Angels Forum has been created where Project Angels can interact and communicate (see also D4.1).

It should be understood that in the PRO-IDEAL terminology, "training" is meant towards potential project participants, whereas "coaching" is geared at potential Project Angels. The difference is that "training" gives basic, practical information whereas "coaching" goes more in depth and includes exercises that future Project Angels must carry out.

Adaptation of on-line courses

Consequently, these two parts are separated on the PRO-IDEAL platform, one under www.pro-ideal.eu/training, the other under www.pro-ideal.eu/projectangels.

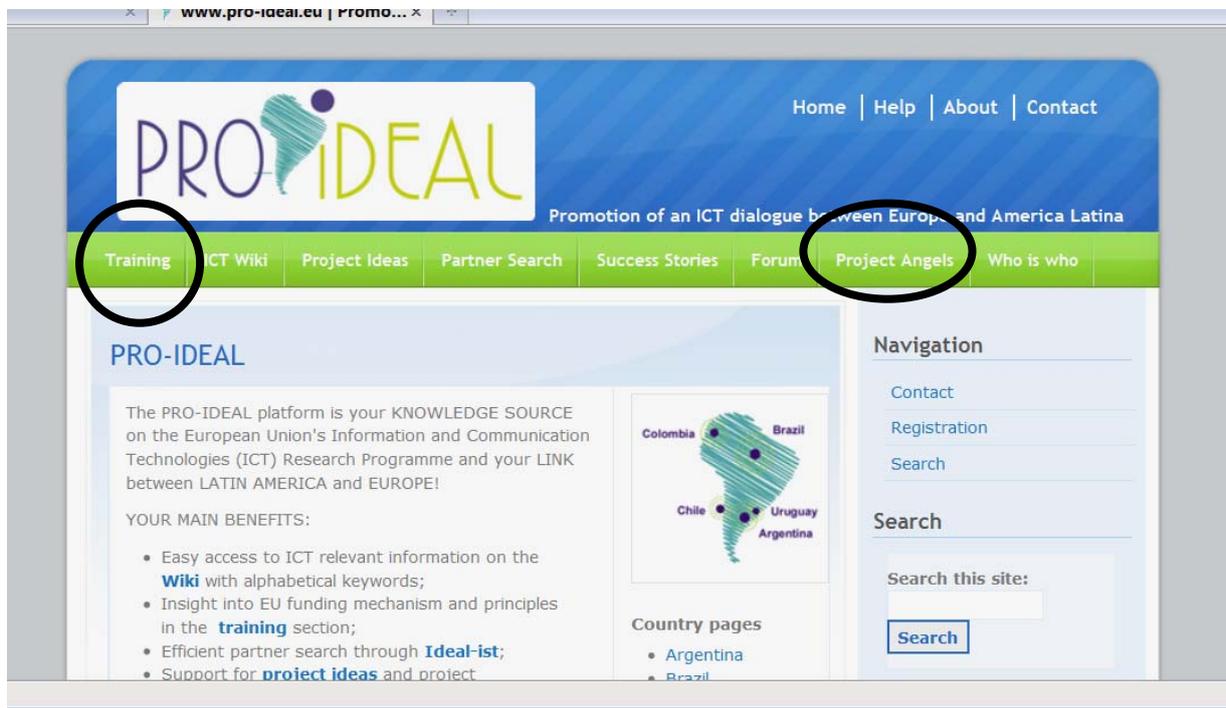
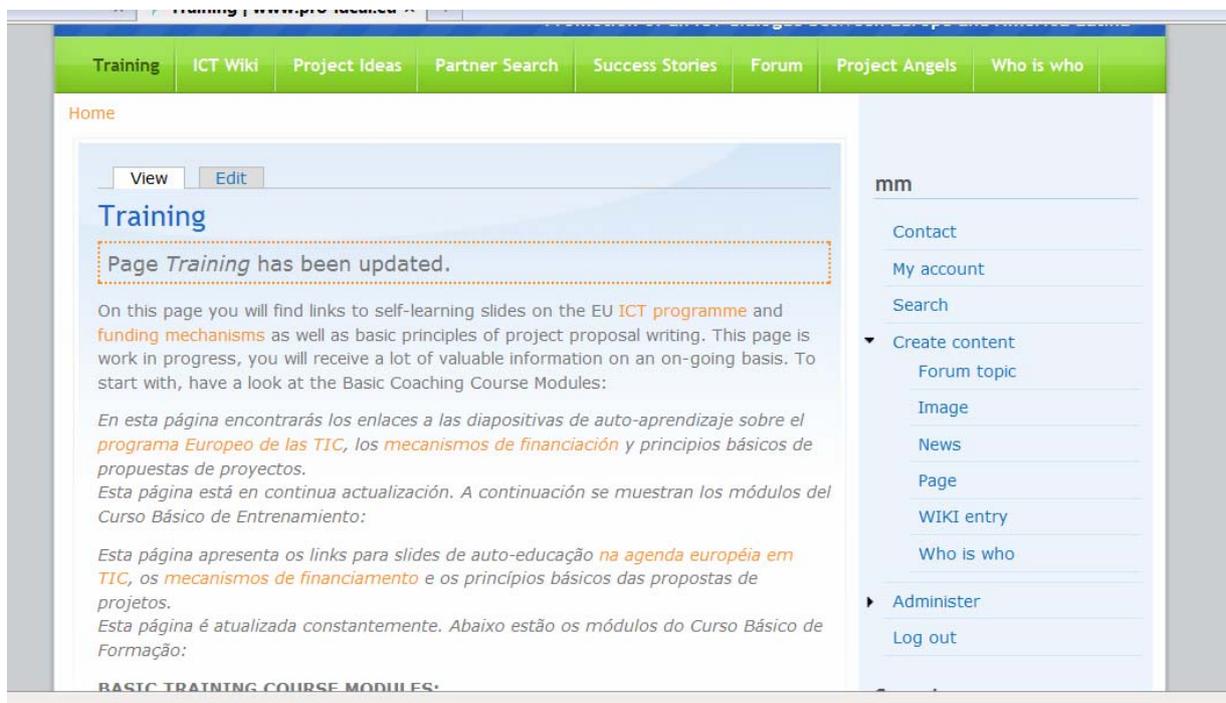


Fig. 1 Screen-shot of PRO-IDEAL homepage

2.1 Training course modules



BASIC TRAINING COURSE MODULES:

- 1. Basic understanding of the EU funding rules for ICT projects**
Gives an overview on the [ICT programme of FP7](#) and its funding principles.
- 2. Understanding "Eurojargon" Spanish version, Portuguese version**
Introduction to "Euro speak" terms and meaning with examples.
- 3. Success factors for international cooperation in ICT projects**
- 4. International cooperation in ICT research opportunities for Latin American participants**
Statistical data of ICT projects with Latin American participation
- 5. Building ICT projects: getting through the Maze**
If you want to participate in a EU project, this module tells you about:
Sources available: [Ideal-ist partner search](#), on-line documents etc.; on-line proposal submission EPSS; obligatory parts of a project proposal.
- 6. Project ideas/partner profile questionnaire: assessment and feed-back**
Tutorial to the PRO-IDEAL project idea and partner profile questionnaire
- 7. Practical steps to a successful proposal**
Work package description; pitfalls and some tips and tricks
- 8. How are project proposals evaluated?**
An insight on how proposal are evaluated
- 9. Self-assessment test 1 and test 2. Solutions**
If you have read the above, you are able to answer test 1 and 2 - don't cheat and look at the solutions first!

Search

Search this site:

Search



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Fig. 2 Screenshot of Training Page

The nine modules follow the original concept as presented during the on-site events, with some modifications and slight stream-lining to make them easier understandable. On the page, as can be seen, each module has a one sentence description so that the page visitor/user knows what s/he can expect.

Module nine consists of two modules of a self-assessment test that can be easily carried out once the other modules are studied. Solutions give explanations to the correct test solutions.

Details of the modules can also be found in D 2.3.

2.2 Project Angels Coaching Course

Project Angels

Project Angels are persons specifically trained in the understanding of the ICT programme and EU funding mechanisms. They are locally established to help potential **project** participants with advice on how to proceed. They are supported by a team of expert Project Managers in Europe.

Six country specific pages with contact details of **Project Angels** as well as the contact details of experienced Project Managers in Europe can be found below. Please contact first the Project Angels (if available) in your country.

*Los **Project Angels** son personas expertas en la comprensión de las TIC y el programa de mecanismos de financiación de la UE. Están establecidos a nivel local para ayudar a cualquier participante con el asesoramiento y el procedimiento de los proyectos. Así mismo, éstos son apoyados por un equipo de expertos en Europa. A continuación se muestran seis páginas con los datos y contactos de los "Project Angels" de cada País.*

*Os **Anjos de Projeto** são especialistas na compreensão das TIC e do programa de mecanismos de financiamento da UE. Eles estão estabelecidos a nível local para auxiliar os participantes com assessoria e nos procedimentos dos projetos. Além disso, eles são apoiados por uma equipa de especialistas na Europa. Aqui estão seis páginas com dados e contatos dos "Anjos de Projeto" de cada país.*

- Argentina (Es) (En)
- Brazil (Po) (En)
- Chile (Es) (En)
- Uruguay (Es) (En)
- Colombia (Es) (En)
- Europe (Es) (En)

Contact

My account

Search

▼ Create content

- Forum topic
- Image
- News
- Page
- WIKI entry
- Who is who

► Administer

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Search

Adaptation of on-line courses



Please be aware that the PRO-IDEAL team is currently training the **Project Angels**. After a 1 1/2 day of face-to-face training in the respective country, follow-up course modules with in-depth information and proactive tests are made available on a monthly basis until June 2010. Successful **Project Angels** will receive a certificate. Interested? [Contact us!](#)

The [Course Schedule](#) gives the roadmap of the coaching modules.

For the Basic Training Modules, please check the [training page](#). Additional modules for Project Angels will be made available below on a monthly basis:

1. Coaching module - May 09: [Partner profile writing](#) and [Partner Profiling Questionnaire](#)
2. Coaching Module - June 09: [How to find project partners](#)
3. [Exercises July/August 09](#)
4. Coaching module - october 09: [How to manage efficiently a project](#) and [Day-to-Day project management](#)
5. Coaching module - Novemver 09: [Real life evaluation \(management part\)](#) and [Test \(project HERMES\)](#)

Home | [Help](#) | [About](#) | [Contact](#)

SEVENTH FRAMEWORK PROGRAMME
Funded by the ICT Programme of FP7



Fig. 3 Project Angel screenshot with Coaching Modules May to Nov 09

The Project Angels concept is meant to leave a practical trace of PRO-IDEAL in the target countries: Persons interested in EU funding programmes, in particular the ICT programme, are familiarized with the principles of R&D funding programmes and must perform exercises. Whereas most of the Project Angels participated in the events in the target countries, hence followed the face-to-face course, the on-line modules are an in-depth course into the matter. Thus, the on-line modules are new, not adaptations, in order to allow for an optimal coaching.

Currently, modules May 09 to Nov 09 are available on-line and reprinted in Annexes 1-6 of this document.

3. Annexes

Annex 1: Module May 2009:



Project Angel Courses: Partner Profile writing (May 09)

MODULE DESCRIPTION:

This course provides you with a guideline on how to write a concise and conclusive partner profile that would allow others to appreciate the quality of that partner and thus, consider including the partner in a consortium.

RATIONALE:

Most often, you will deal with persons or organisations that are willing to participate in a European project but do not know how to do it. The first step is to get known: To raise one's visibility and to signal: I am willing to share my knowledge with you!

INTRODUCTION:

If you need to write a partner profile or support somebody to do so, you need to know some basic principles. First of all, the person must want to collaborate. This sounds obvious, but this collaboration has some serious implications:

- You share benefits but also responsibilities
- You share your knowledge (as everybody else)
- You share results (which sometimes need negotiation)

In short: You do not work in an isolated corner but in an international, most often high-level partnership according to a commonly agreed work plan with tasks for each partner. If you are aware of this, and if you accept this challenge, then you are ready to go ahead.

HOW TO PRESENT ONESELF?

No matter where you plan to submit your profile, you need to clarify some points with yourself:

1. What is my company/organisation/institution's work experience so far? This description must include for example products developed, services rendered and ideally, include a client's list and a list of successful project in which the organisation participated. These projects can be commercial (e.g. development projects) or research projects etc.
2. What is the experience of the main personnel? Don't list all support personnel but 1-3 core persons acting (e.g. technician, developer, management).
3. Where is my company today? This explains in which market (geographical and domain) the organisation is currently acting and what are its competitors. Describe what is its asset in comparison to competitors.

Once you are clear about these three issues, you can move ahead and ask yourself:

- What do I want to achieve through the participation in a European project? There are many options, e.g. enhance one's product or service portfolio, participate in research relevant for my core activity, get access to an international research community, etc.

- Finally, what can I bring to a project? This is a bit a summary of items 1-3 but targeted to potential project consortia. That means: describe what your organisation is best at, how and to which extent you are willing to share this experience, and where you want to engage in new work.

TASK 1:

Write your own company/institute/organisation's profile using the enclosed Partner Profile Questionnaire. If you are currently working on your own, write your own personal profile.

Please write in "Other remarks" at the bottom "Project Angel" so that we know that this is in response to this course.

Please send the questionnaire to the e-mail indicated on it. We will evaluate it as soon as possible and give you a feed-back with further recommendations.

TASK 2:

Find a "real" potential project partners and fill together with him/her the Partner Profile Questionnaire. After all, you want to establish contacts as soon as possible so that you can convincingly act as Project Angel at the end of the Course.

This may take more time but you can submit such a profile until end August (for this phase). Of course, if you come across other interested persons in the course of this Coaching Course, you can anytime submit a profile or ask us for advice).

Please note that this questionnaire is kept confidential and assessed by our experts only for the purpose to find a potential project consortium. We DO NOT automatically submit it to public partner search like CORDIS or Ideal-ist.

Annex 2: Module June 2009



Project Angel Courses: How to find partners? (June 09)

MODULE DESCRIPTION:

This module gives you some options where to look for partners. You can look at the tools “passively”, that is, you scan the offers for collaboration, or you can use your knowledge from the former module and submit your own profile, thus enhancing your chances. You always have the “taylor-made” option of the PRO-IDEAL questionnaire but the below tools may spread your chances.

RATIONALE:

Most of the time, potential project partners will ask you “how to get involved in projects”. This modules gives you the answers.

INTRODUCTION:

We selected 3 options to find partners:

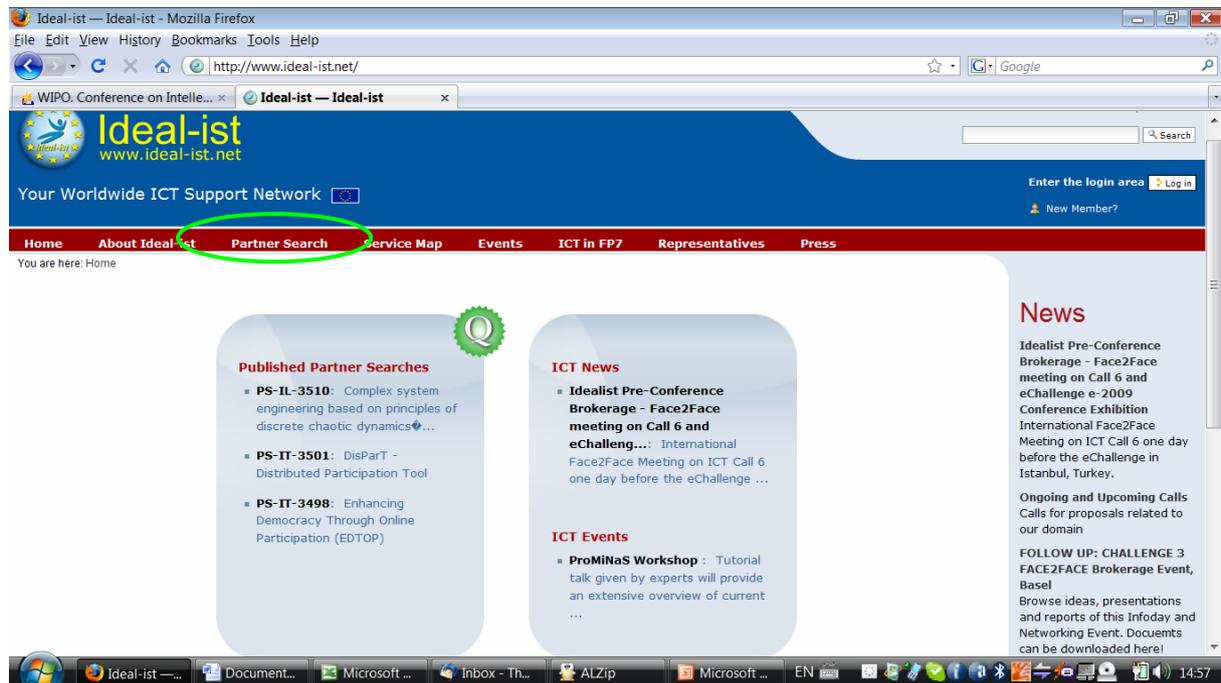
1. The EMF network that collects partner profiles on its database: www.ematch.eu
2. The Ideal-ist partner search tool, the biggest and probably most sophisticated tool
3. CORDIS which is probably the largest, covering not only ICT or FP7 but other programmes as well.

HOW TO FIND PARTNERS:

1. www.ematch.eu

In going to the eMatch profile list (see [eMatch Profile List](#)), you can see more than 600 profiles. If you register, you can create your own profile and you enjoy more search options. Currently, the majority profiles are from Nordic countries, but we started profiles from Colombia.

2. www.ideal-ist.net



When entering the homepage, you immediately see “Published Partner Searches” that provide you with the most recent searches.

When you click on “Partner Search” (see [Partner Search](#)), you can choose between the following:

- **New and want to [start your own Partner Search](#) or Competitive Call? Choose "New Proposer?"**
- **Look for Open Partner Searches**
 - [View all](#)
 - [Search for specific Partner Searches](#)

If you want to register your own profile, you have to take some time to fill in all steps. More details on how to do this can be found at:

http://www.pro-ideal.eu/sites/default/files/4_Building_ICT_projects.pdf
the PRO-IDEAL training modules that helps you build EU projects.

If you just want to “browse” what is on offer, you choose

- **Look for Open Partner Searches**
 - [View all](#)
 - [Search for specific Partner Searches](#)

Many of the listed proposals on offer received a “quality label” which gives you a certain degree of security with regard to the seriousness of the offer.

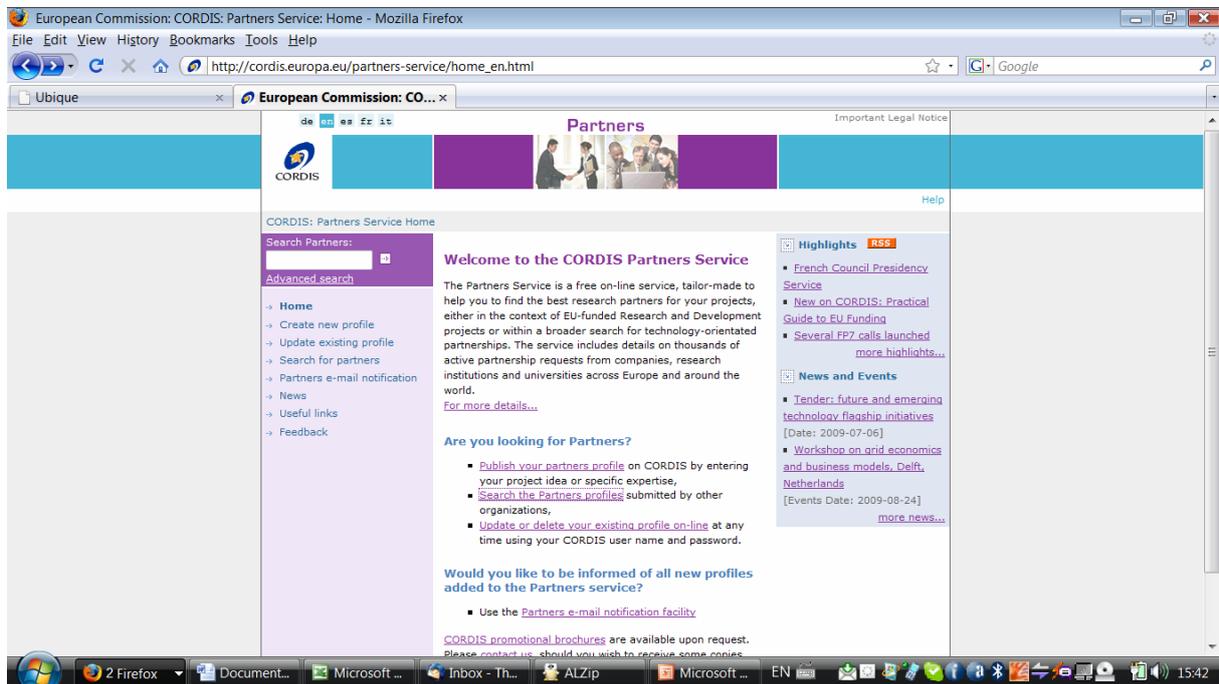
3. CORDIS

http://cordis.europa.eu/partners-service/home_en.html

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This is a rather complex partner search tool – but it offers also a broader selection of potential participation. This page exists also in Spanish:

http://cordis.europa.eu/partners-service/home_es.html



CONCLUSION:

You should familiarise yourself with each of the tools and find out which is the most appropriate for your purpose. At the beginning, all tools will appear to be “complicated” but after some time you will find your way – and then, you can help others to find their way!

Annex 3: Module July/August 2009 – Tests

TEST ON MODULES JULY/AUGUST 2009:

Q1:

a) My company is a research institute of a private university. Can I participate in the ICT programme as partner?

b) I am a micro-company with 3 employees creating software applications. Can I participate in an ICT research project?

Q2:

a) I am the micro-company and plan to develop an innovative software application together with 2 universities, and a large industry partner. Is this possible within the ICT programme?

b) I am a researcher in the institute for applied mathematics and I want to study abroad. Can I participate in an ICT project to travel to Europe for this purpose?

Q3:

a) Can I submit any time a proposal?

b) I need money to expand my business – can I get a quick funding decision?

c) Who decides about the duration of my project?

Q4:

a) Do I have to pay back some money that I receive from the European Commission within an ICT research project?

b) Do I have to contribute in cash to the part not funded by the EC? If no, how do I contribute?

Q5:

I am submitting a proposal with 3 Latin American partners and 2 European ones. Is this possible?

Q6:

Why is it not such a good idea to be a third-country coordinator?

[Give at least two good reasons.]

TIP:

Have a look at:

http://cordis.europa.eu/eu-funding-guide/checklist_en.html

This page exists also in Spanish:

http://cordis.europa.eu/eu-funding-guide/checklist_es.html

These checklists may help you answering the questions, together with the modules under <http://www.pro-ideal.eu/training>

Annex 4: Module September 2009: Solutions of previous tests

TEST ON MODULES JULY/AUGUST 2009 WITH SOLUTIONS:

Q1:

a) My company is a research institute of a private university. Can I participate in the ICT programme as partner? YES

b) I am a micro-company with 3 employees creating software applications. Can I participate in an ICT research project? YES. But be aware that, if successful, your financial and technical capability might be checked: If you ask for a budget of 150.000 EUR and your turnover is only 50.000 EUR, you might have a problem! If you account for 3 person/years for an 18 Month project and your company has only one permanent person working, you might not be credible.

Q2:

a) I am the micro-company and plan to develop an innovative software application together with 2 universities, and a large industry partner. Is this possible within the ICT programme? YES.

b) I am a researcher in the institute for applied mathematics and I want to study abroad. Can I participate in an ICT project to travel to Europe for this purpose? NO. Not for this purpose. But you can apply for support within the Marie Curie programme: <http://ec.europa.eu/mariecurieactions/>

Q3:

a) Can I submit any time a proposal? NO. Only when there are calls for proposals. But then, you need to submit it BEFORE the deadline.

b) I need money to expand my business – can I get a quick funding decision? NO. Funding decisions are taken between 6 to 10 months from the call deadline.

c) Who decides about the duration of my project? You, that is your coordinator with the consortium, depending on the type of project. E.g., small research projects are usually lasting 18 to 30 months, big research projects like Integrated Projects (IPs) last commonly 3+ years.

Q4:

a) Do I have to pay back some money that I receive from the European Commission within an ICT research project? NO. Project funding are grants that are not to be paid back. However, if the project DOES NOT PERFORM and has to be closed before end time, then you might be asked to pay back money (but this is a very unfortunate situation for all parties and should be avoided).

b) Do I have to contribute in cash to the part not funded by the EC? If no, how do I contribute? NO, you do not need to contribute in cash. However, whenever co-funding is applied (most of EU projects) you need to account for the % not covered by the EC: e.g. in terms of work force or overheads. EXAMPLE: Your organisation is a SME and thus funded at 75%. If you work 100 man/days for the project, the EC pays you 75 days, the other 25 days are your contribution.

Q5:

I am submitting a proposal with 3 Latin American partners and 2 European ones. Is this possible? NO. There is a minimum of 3 European partners from 3 different European

countries. Except for International Cooperation projects (Objective 2009.9.1 to 2009.9.3), the focus must be in Europe to justify European funding.

Q6:

Why is it not such a good idea to be a third-country coordinator?

[Give at least two good reasons.]

1. A coordinator is the partner to interact with the EC. If you are far away, you may need a very high travel budget.
2. The coordinator is responsible to distribute the funds. If outside Europe (and in particular, the EURO zone), this may result in increased fees for the banks!
3. You have to coordinate all partners. That means constant interaction, which might be difficult if the majority of partners resides in another time zone.
4. It is probable that other project partners have more experience than you in project coordination. This is a difficult task and should not be underestimated. Weak project coordination can ruin an otherwise excellent project. Thus, experienced partners are necessary for smooth project management.

Annex 5: Module October 2009



Project Angel Courses: How to manage efficiently a project (October 2009)

MODULE DESCRIPTION:

This module gives you some options how to manage efficiently a project.

INTRODUCTION:

A Quality Management Plan (QMP) is needed to manage efficiently a project. The objective is to specify quality standards and procedures to be applied in the management and execution of the project.

For a successful management, an effective Organizational Structure must be Created and defined. The project management structure must be designed to link together all the project components and maintain effective communication with the Commission and within the whole Work team to create an effective and harmonious working partnership.

1 The Work Team

According to the size of the project, the management roles as described below may be omitted (e.g. merge administrative and technical co-ordinator) or enhanced (e.g. task leaders for complex research projects).

A steering group: a team in charge of the strategic guidance of the project, consisting of one person per partner

A project Co-ordinator (administrative and finance manager): The project Co-ordinator will ensure that the project is carried out using the highest standards and procedures of work in terms of management, quality of deliverables, according to the standards of a project; to ensure that the project is completed according to the administrative requirements specified in the Contract and within the approved timescale and budget; the partner who interacts with the European Commission.

A technical co-ordinator: Research or technical oriented projects may benefit from a technical co-ordinator. S/he is the leader to co-ordinate all work packages, monitors the timely progress and notifies the project co-ordinator (sometimes also called administrative co-ordinator) of any delays or problems.

Communication manager: The Communication manager is responsible of maintaining the communication flow among the consortium. This is of particular importance with an international consortium with different time zones.

Work packages Leaders: The WPs leaders are designated on the basis of their technical, managerial and relevant competences and specific expertise, which will ensure the technical accomplishments and optimum co-ordination of their activities according to the project plan's schedule of technical achievement. Work package leaders co-ordinate the work of the work package. This does not mean

that they do all the work themselves but they have an overview and interact with the technical coordinator!

Staff services: The Management Team might be supported in its work by services assistants that will provide the logistics and co-ordination services to ensure efficient management of the project. This includes legal services for issues of confidentiality, Intellectual Property Rights (IPR) and copyright.

External Advisory board: The Advisory Board may be useful to assess independently project results and give recommendations if considered necessary.

2 Make the reports:

All deliverables that result from the Work Packages shall be submitted to the EC by the delivery date. Partners involved in the work package of which the deliverable is a result, should contribute to it. Completed deliverable contributions shall be sent to the Project coordinator who takes care of editing and submission to the Project Officer and distribution to the Consortium.

3 Create a good and effective Risk management plan:

A risk management plan has been set-up to ensure an effective development of the project. The results of this process will be included in the Periodic report.

The Risk Management plan comprises four phases:

- Risk Identification
- Risk Analysis
- Risk response actions (risk mitigation)
- Risk monitoring and control

4 Foresee a dispute settlement mechanism:

In case of disputes among partners, a clear procedure should be in place. This could be, as an example, that the Steering Committee decides by qualified majority; or that the Steering Committee nominates 3 representatives that decide unanimously. Finally, it could be decided that the final decision is made by the Advisory Board.

In big consortia with potential commercial results, it is good to foresee such a procedure already in the Consortium Agreement, to be concluded before the project start. This is an agreement among all partners that defines important issues such as drop-out of a partner, non-performance of a partner, intellectual property rights etc.

5 Monitor and measure the achievements of the project:

Find quantitative indicators to know the achievements of each of the work packages you will have in a project.

WP No	Work package title	Quantitative Indicator
2	<i>Awareness raising & Coaching Courses – Content preparation and events organisation</i>	<ul style="list-style-type: none"> • Number of potential partners reached. • Number of workshop participants in: <ul style="list-style-type: none"> ○ Awareness raising courses ○ Coaching Sessions

Define all the work Packages of the projects and create a calendar with starting and ending dates of each activity done in the project:

WP No	Work package title	Type of activity ¹	Lead beneficiary no.	Lead beneficiary short name	Person-months	Start month ²	End month ²
1	<i>Identification of stakeholders, priorities and success factors</i>	SUPP	1	INMARK	8	Nov /08	April /09

6 Define the deliverables of the project:

Attach to the bases of the deliverables format style, structure for all.

Define who is going to be in charge of each deliverable

Define how many deliverables will be per each work package

Define a schedule for the deliverables

7 Ownership of project results and IPR:

Should be defined if it is needed (see above "Consortium Agreement").

This module has a second part that provides practical hints:

CREATE A EFFICIENT QUALITY PLAN ALREADY AT THE PROPOSAL STAGE

This will make the actual management of a project much easier:

PLANNING THE WORK:

- Define all the work Packages of the projects:
This allows for manageable work modules.
- Define the deliverables of the project:
Attach to the bases of the deliverables format style, structure for all.
Define who is going to be in charge of each deliverable
Define how many deliverables will be per each work package
- Create a calendar with starting and ending dates of each activity done in the project
- Define a schedule for the deliverables
- Defined Ownership of project results and IPR

MANAGING THE WORK:

- Create and define an effective Organizational Management Structure
 - See enclosed document
- Create an effective and harmonious working partnership
- Draft the reports
- Submit the reports to the EC in time
- Create a good and effective Risk management plan:
Including, Risk identification, Risk Analysis, Risk response actions and Risk monitoring and control

MEASURING THE WORK:

- Measure the achievements of the project:
This can be done in checking the achievements against the work plan and envisaged results

DAY-TO-DAY PROJECT MANAGEMENT:

Rule 1:

Communicate: It is essential that all partners have the impression that “somebody cares” and leads the group. Communication is the “glue” between partners’ activities!

Rule 2:

Face-to-face contact: Organise the kick-off meeting in a way professional and pleasurable at the same time. The first meeting is crucial to create trust among the partners.

Rule 3:

Clear messages: Make sure that all understand the objectives of the project and that they know their respective roles. Different cultural and educational backgrounds (common in EU projects) lead to different perceptions of issues. Respect them but find a common understanding!

Rule 4:

Motivation with results focus: The result matters, not the good will. If there is a stand-still or problem, the project manager is the one to “grease the wheels”.

Rule 5:

Take decisions: Sometimes, clear decisions are needed. An “overdemocratic” project management leads to chaos.

Annex 6: Module November 2009



Project Angel Courses:
Real life evaluation (management part) (Nov 2009)

MODULE DESCRIPTION:

This module provides a real management description of a proposal (anonymised; separate document) and asks for evaluation of the management part.

INTRODUCTION:

In the October module, the project Angels got acquainted with the different parts that a good project management description should contain. In this module, they can apply what they learned in a real life scenario: evaluate a management description of a proposal.

To carry out the evaluation, first there is a description on how to evaluate (according to the rules of real experts of the European Commission). Questions will help guiding the Project Angels to fill in the "form".

In the successive December module, the different evaluations will "meet" on-line and simulate a consensus meeting.

In order to understand the different parts of a proposal, this exercise is a useful "hands-on" experience.

1 The evaluation - overview

A full proposal consists of between 65 and 120 pages, roughly divided in three parts:

- Scientific and technological excellence
- Implementation
- Impact

The evaluation follows this division. A full evaluation consists of the following sections:

S/T QUALITY "Scientific and/or technological excellence (relevant to the topics addressed by the call)"	IMPLEMENTATION "Quality and efficiency of the implementation and the management"	IMPACT "Potential impact through the development, dissemination and use of project results"
<ul style="list-style-type: none"> <input type="checkbox"/> Soundness of concept, and quality of objectives <input type="checkbox"/> Progress beyond the state-of-the-art <input type="checkbox"/> Quality and effectiveness of the S/T methodology and associated work plan 	<ul style="list-style-type: none"> <input type="checkbox"/> Appropriateness of the management structure and procedures <input type="checkbox"/> Quality and relevant experience of the individual participants <input type="checkbox"/> Quality of the consortium as a whole (including complementarity, balance) <input type="checkbox"/> Appropriateness of the allocation and justification of the resources to be committed (staff, equipment...) 	<ul style="list-style-type: none"> <input type="checkbox"/> Contribution, at the European and/or international level, to the expected impacts listed in the work programme under relevant topic/activity <input type="checkbox"/> Appropriateness of measures for the dissemination and/or exploitation of project results, and management of intellectual property.

The evaluation of the Management part falls under section 2: Implementation (see yellow part above).

2 Evaluating the management part

In the official form, management is assessed by deciding about the "Appropriateness of the management structure and procedure".

What does this mean? It is simpler than it sounds, you just have to answer the following questions:

- Is the structure sufficient to manage a group of partners from different countries?
- Is the hierarchy clear: who decides what?
- Does every partner have a role in the management process, e.g. participating in a Steering committee?
- How do the partners communicate?
- Do they meet from time to time?
- Who writes the reports?
- In case of a problem, how are conflicts solved? By whom?
- In case of delays or other problems, who monitors the risks, and how?
- Is a risk mitigation foreseen?
- Is it clear who has the Intellectual property rights after project end?

In your evaluation, you should consider the above question and write a short assessment (1/2 page).

3 Scoring

To make the exercise as real as possible, you will have to score. There are 6 options:

0 The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information;

1 Poor The criterion is addressed in an inadequate manner, or there are serious inherent weaknesses;

2 Fair While the proposal broadly addresses the criterion, there are significant weaknesses;

3 Good The proposal addresses the criterion well, although improvements would be necessary;

4 Very good The proposal addresses the criterion very well, although certain improvements are still possible;

5 Excellent The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

It is recommended to first, write the text, and then think about the score. For example, if you have a lot of criticism and then score 4, there is no coherence. Text and score should fit together.

4 Practical hints:

The test text stems from a STREP, a small research proposal (average 5-7 partners, 2 years duration).

What is your first impression when you read the text? Often, a clear text reflects a clear structure.

Is the management structure too complex for a STREP? Or is it too simple?

Are all procedures considered? (Hint: Check through the October module)

Would you suggest changes? If yes, which?

Would you feel confident being part of such a management structure?

Enjoy the exercise – and if you have questions, please contact Idoia.

Here is the management part of the anonymised proposal HERMES for assessment by the Project Angels:

TEST PROJEKT “HERMES”

Section 2. Implementation

2.1 *Management structure and procedures*

The objectives of project management are the following ones: (i) ensuring project compliance with EC rules, (ii) meeting the objectives of the project within the agreed budget and timeframe, (iii) coordinating project activities and ensuring effective internal communication, (iv) carrying out quality control of the work performed and of deliverables, (v) providing adequate information to the decision making body (vi) informing governing bodies about problems or conflict situations and (vii) setting up an organisation to support the above objectives. A consortium agreement (CA) setting the principles of the Consortium management will be prepared and signed by all participating members prior to finalising contract negotiations with the Commission.

2.1.1 Project command structure: committees, responsibilities and decision process

Strategic management:

The Scientific Manager leads the scientific management together with the Steering Committee which will receive scientific advice from the Scientific Advisory Board and legal advice from the D&IPR Deputies.

The Steering Committee (SC) is the HERMES decision making and arbitration body. It shall consist of one representative per beneficiary and it will meet at least twice a year. For cost efficiency reasons, one of the SC meetings will take place in the same period as the annual meeting. Decision within the SC will be taken under the following principle: one representative, one vote and by a majority of two-thirds (2/3) of the votes. The SC shall not deliberate and decide validly unless two-thirds (2/3) of the beneficiaries are present or represented (quorum). Its duties include:

- Analyse the political and strategic orientations of the project
- Take decisions on the necessary changes in the Grant Agreement (budget, work plan, activities, etc.)
- Take into account the evolution of the consortium (inclusion, exclusion, withdrawal of a participant)
- Analyse and validate technical propositions presented by the Work package leaders
- Take major decisions on exploitation and dissemination of project results after consultation with the D&IPR deputies.

The Project Coordinator: Mr. X will be the Coordinator of the HERMES project. Mr X. is appointed by the Scientific Manager as the Project Coordinator. He has ample expertise in the management and implementation of both national (e.g. the MORPH project) and European projects. The Project Coordinator, with the support of the Management Support Team will ensure:

- The day-to-day coordination in accordance with the objectives of the project and the established timeline,

- The progress monitoring of the project and the quality control of the project methods and results
- The risk monitoring during project implementation with support from the Work Package Leaders,
- The organisation and the submission of all cost statements and deliverables to the European Commission,
- The liaison between the different committees of the project,
- The liaison between the consortium and the external contacts of the project (scientists, mass-media, organisations, etc.)

The Scientific Advisory Board (SAB). The HERMES SAB will be established before the start of the project. It will include between 2 to 4 independent experts on scientific issues in relation with the HERMES research activities and deliverables. They will be officially nominated by the Steering Committee during the kick-off meeting. The SAB will have an advisory role on specific scientific matters linked to the HERMES deliverables and on the international contest organisation and candidates' selection. The SAB shall elect a moderator for its deliberations, and meets annually or upon request of the Steering Committee, on the basis of a dedicated budget, foreseen within the management activities of the project Coordinator.

□ **Dissemination of knowledge and Intellectual Property Rights Deputies (D&IPR deputies)** will be responsible for advising the Steering Committee on matters concerning the dissemination of knowledge and arbitration of intellectual property issues arising from the project, on the basis of principles described within section 3.2. During the kick-off meeting of the HERMES project, each beneficiary shall appoint one deputy, which will be an expert in the field of intellectual property rights. They may be invited by the Project Coordinator to participate in Steering Committee meetings, having speaking but non-voting rights. The Deputies will monitor the production of reports by the WP leaders as regards to IPR issues, and will help the Management Support Team in maintaining a repository of the publications and communications of the members of the consortium.

Operational management

□ **The Management Support Team** shall be appointed by the project Coordinator and shall be in charge of handling the HERMES management (in particular planning preparation and minutes of the SC meetings and annual meetings; financial administration and coordination/communication between beneficiaries; maintaining a repository of the publications and communications of the members of the consortium; organising logistic aspects for the annual meetings and the international contest). It will be under the control of the Project Coordinator assisted by an experienced project manager (1/3rd time appointed with the foreseen resources) and will meet as often as needed.

□ **The Work Packages (WP).** The project is organized into 7 Work Packages (WP) each lead by a WP leader (see WP list , section 1.3) who supervises the work and associated risks on a permanent basis. The WPL will organize WP meetings or teleconferences when necessary and at least every three months. Each Work Package leader will be responsible for fast and thorough transfer of scientific knowledge and results to the D&IPR deputies, the Coordinator and appropriate partners.

The results will be communicated via progress reports to the SC and meetings within the consortium.

2.1.2 Internal communication strategy

The Coordinator will ensure that all relevant information (progress reports, dissemination and financial data) is distributed up and down the chain, from the individual scientists executing part of a task through the Work Package Leaders and to the EU scientific and financial

officers in charge of the HERMES project. As informal communication is important to establish a climate of confidence between participants, it will be highly encouraged. Nevertheless the formal communication will not be neglected within this project. It will be implemented through the HERMES web site, providing the basis for periodic management reports, decisions support to re-planning, reallocation of resources and Grant Agreement amendment whenever required. Among other facilities of the website that will be created/used:

- Management of meetings agenda, minutes and meetings attendance providing a basis for tracing and granting intellectual contributions to the project;
- Electronic registration of deliverables and their successive versions

2.1.3 Methods and tools for analyzing the progress of the project

Site visits on an ad hoc basis at the institutions of the consortium represent an important and effective means of co-ordination and management in a project of this type. They facilitate deep understanding of the work being done and the context within which it takes place (including any risks/problems of laboratory facilities/grids, expertise, resources etc), and they also provide a valuable means of supervision. Site visits will thus be organised by the Project Coordinator to the different laboratories within the consortium; the necessary budget for these visits has been foreseen within the Coordinator budget.

Annual meetings will be organized on a yearly basis. This will be the opportunity to gather all HERMES players, to promote cooperation and integration and to present the main project advances and orientations. Each annual meeting will contain special advanced introductions in the various scientific domains covered by the consortium and will thus contribute to the improvement of the communication and the level of understanding between law practitioners and theoreticians, mathematicians, computer scientists and specialists of machine learning. At each annual meeting where representatives of all partners will review progress of the project, the EC Scientific Officer will be invited.

Six months internal reports through the HERMES web site:

The actual effort of each partner as well as the progress of activities will be monitored by the Coordinator with support of the Management Support Team on a bi-annual basis and compared to the Work Plan. The Steering Committee will discuss any major deviation from the initial work plan and will take appropriate decision.