

# Coordinating an eTEN project

*Brussels, 14 July 2005*

*eTEN Coordinators' Workshop*

# Objectives of presentation

- Specific tasks of project co-ordination
- How to keep the consortium successfully working together
- How deliverables are produced
- Helping the partners with Cost Statements
- Organising eTEN reviews
- Participating in Dissemination events



- Coordinating a project is not easy
- Complete strangers have to collaborate towards a joint goal
- Often there are different agendas
- Even in the best consortium there is always at least one partner who will do everything possible to be difficult
- Some of the partners will not do the work
- Not possible to be ultra-friendly with everyone – have to take tough decisions, but...
- You cannot force decisions through. If you have to apply the 51% majority on an issue, that issue will return again and again



## ○ Project Management

- *Reaching goals, monitoring progress*
- *Deliverable preparation*
- *Managing Conflicts*
- *Dealing with the Commission*
- *Managing Project Reviews*

## ○ Project Administration

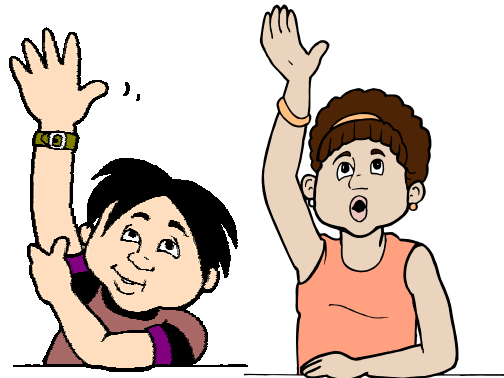
- *Financial guidelines for each of the participants, advice in managing costs, keeping receipts, keeping track of work done*
- *Project Reporting*
- *Preparation of cost statements*
- *Web tools*



- Dictator
- Benevolent dictator
- Roman general (divide and rule)
- Managing director
- Pacifist
- Reasonable person
- Mr Micawber (“Something will turn up”,  
“Let’s hope it will all work out”,  
“It’ll be okay on the day”)



- What are the most important considerations for a coordinator?
  - *Able to reach consensus?*
  - *Make sure that the Commission contract is respected?*
  - *Establish his/her authority?*
  - *Make sure that all partners know the rules and regulations of how the project is going to be run?*
  - *Be able to communicate very well in English?*
  - ...
  - ...
- Let's do a test...



Score 1 for unimportant, 5 for very important, total must be 42

1	<b>Good Communicator in English:</b> <i>able to promote the project in many contexts, with the Commission and the reviewers</i>	
2	<b>Capable with Communications Technology:</b> <i>able to provide facilities such as mngt WEB pages, video-conferencing, net meetings, etc</i>	
3	<b>Technical Know-how in project domain:</b> <i>an expert in areas of the proposed work</i>	
4	<b>Leadership:</b> <i>Able to motivate diverse groups towards an overall goal</i>	
5	<b>Experienced in formal project management:</b> <i>Trained in formal methods and software for project management</i>	
6	<b>Diplomatic:</b> <i>Able to negotiate with partners to resolve conflicts</i>	

7	<b>High Administrative skills:</b> <i>Can define and implement procedures to support progress reporting, cost claims, deliverable production</i>	
8	<b>Open to different cultures (business, nations):</b> <i>Willing to adapt procedures to "best fit" consortium and project</i>	
9	<b>Contracts expert:</b> <i>Can interpret contract clauses (especially concerning IPR)</i>	
10	<b>Politically astute:</b> <i>Sensitive to problems and priorities of partners and Commission</i>	
11	<b>Tolerant of bureaucracy:</b> <i>Recognize the importance of accountability where public funds are involved</i>	
12	<b>Respected by line management:</b> <i>Has strong position when negotiating with partners and Commission</i>	



- There is no perfect answer to the previous slide, but it is important to understand the priorities and where the emphasis should be
- My personal opinion would give high marks for Diplomacy, Leadership and Good English (really!), and while the Coordinator personally need not be a skilled Administrator, there must be an expert support staff to manage the complex administrative issues involved in dealing with the Commission.



## ○ Obligations of Coordinator

(Annex 2 - art 2.1)

- *Only point of contact between project and Commission*
- *Provides all reports to Commission*
- *Receives payments and transfers to each contractor within 30 days, and notifies Commission*
- *Informs all parties of changes occurring in project*



## ○ Obligations of Contractors

(Annex 2 - art 2.2):

- *Conclude a consortium agreement*
- *Supply to coordinator all data to enable reports to be prepared*
- *Inform coordinator of any changes inside organisation linked to project*
- *Take all reasonable and necessary measures to carry out the work incumbent on a defaulting contractor*



- The Coordinator has to do a lot of preparatory work before the project starts
- Prepare Consortium Agreement for partners to sign
- Define procedures
- Make sure decision-making mechanisms are clear
- Clarify responsibilities
- Setup communication mechanisms
- Setup internal project website



- It is best if the internal site is online in time for the Kickoff meeting
- It will take at least a week of work just for the basic structure
- The structure should foresee:
  - *Contact details of project participants*
  - *Information on future meetings and minutes of past meetings.*
  - *Latest contractual documents.*
  - *Presentations made at meetings.*
  - *Project deliverables and internal documents.*
  - *Useful information for the management of the project: document template, cost statement forms, project logo, etc*



- Before the project starts, a Consortium Agreement must be signed by all partners
- Do not wait until the project is underway, it will get more and more difficult as time goes on to get all partners to sign it
- Regulates internal organisation and management of consortium, defines rights and obligations
- Not in conflict with the EC Contract, but extends it



- Internal organisation of consortium, governance structure, decision-making processes, management procedures
- Definition of rights and obligations regarding IPR management and access
- Arrangements for distribution of the Community contribution among participants and among activities
- Provisions for the settlement of disputes, and penalties
- Management of knowledge generated by project, and rules for knowledge transfer
- Other provisions deemed necessary to ensure a sound management of the project



- Highest authority in project, sets direction & strategy
- Responsible for financial and contractual issues
- Responsible for technical management and execution of project
- Reviews Technical Annex and Consortium Agreement
- Responsible for adherence to deadlines
- Chaired by representative of coordinating partner
- Composed of one representative from each partner





- Project Director is responsible for:
  - ➔ *Execution and strategic management of the project*
  - ➔ *Overall technical co-ordination*
  - ➔ *Administrative matters*
- He/she will:
  - ➔ *Implement the agreed strategy*
  - ➔ *Oversee the choice of techniques*
  - ➔ *Supervise the monitoring of the results*
  - ➔ *Chase the partners for deliverables, project reporting, Cost Statements*



- Periodic meetings defined in advance
  - ➔ *Project Board*
  - ➔ *Project Review*
- No pre-defined schedule
  - ➔ *Technical / Working meetings*
- Procedures
  - ➔ *Agenda and relevant documentation sent in advance*
  - ➔ *Minutes of meeting to be sent quickly by convening chairperson*
  - ➔ *Check commitment on decisions and actions with absent partners*
  - ➔ *Project administration function to maintain decision database*



- Organisation of project defined in Quality Plan document
- Designed to facilitate cooperation
- Describes management structure and procedures
- Defines templates and styles
  - ➔ *Determines “brand” of project*
- Quality Plan is reference document
  - ➔ *For what has to be done in project*
  - ➔ *How to present deliverables to EC*
- Fundamental that all partners refer to it when preparing deliverables



- Purpose of Document
- Project Organisation
- Procedures & Meetings
- Project Handbook
- Technical Annex
- Standards and Tools
- Management Reports
- Deliverables
- Contractual Issues



- Project workplan structured into work packages, each of which is divided into units of work (tasks)
- Work Package leader responsible for:
  - ➔ *Convening work package meetings*
  - ➔ *Checking that the work is carried out according to the plans*
  - ➔ *Managing the resources allocated to work package and supervising work*
  - ➔ *Proposing a Deliverable Development Plan for the Work Package*
  - ➔ *Sending the Deliverables to the Project Director for approval*



- Deliverables are defined in the Technical Annex and are strictly tied to WPs
- Generally technical documents
- Important for Commission appraisal on project evolution
- Each deliverable should have a “Deliverable Manager”
  - ➔ *Define plan to produce deliverable*
  - ➔ *Contributions expected from each partner*
  - ➔ *Deliverable Manager will merge inputs from different partners*
- Identify set of "key deliverables" that could be subject to an additional specific Quality Assurance review



- Kickoff meeting
- Allows all partners to meet
- Explain the procedures
- Go through the contractual issues
- Remind all partners to read the contract and its annexes and their responsibilities
- Analyse together the targets for the first 6 months
- Assign responsibilities for the first set of deliverables
- Social dinner fundamental (in vino veritas)



- EC performs control of Project progress as follows:
  - ➔ *Periodic Progress Reports summarising work that has been done, any issues that have arisen, resources used*
  - ➔ *Deliverables that are the major results of the Project*
  - ➔ *Project Reviews*
- Important to let Project Officer that everything is under control by ensuring that these reports and deliverables are on time and good quality



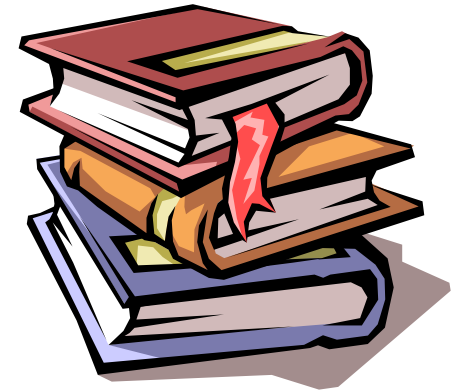
- 3 monthly management reports
  - ➔ *Can contain estimates of effort / costs*
  - ➔ *Should be supplied quickly – need to start reminding partners early*
- 9 monthly progress reports
  - ➔ *Must be accurate*
  - ➔ *Cross-checked against cost statement*
  - ➔ *Must justify the numbers in cost statement*
- Cost Statements
  - ➔ *Every 9 months*
- Final report and final cost statement
  - ➔ *To be submitted within 2 months of end of project*



- Do not underestimate the time needed to get even the smallest input
- Whenever you ask for “hours spent per WP” you will get the strangest input that will need to be “negotiated” with the specific partner involved – you will often get hours charged to workpackages that have ended
- Cost Statements are difficult, you will have to handhold many partners and explain again and again what “direct costs” are and how to calculate overheads. Hours reported will change when the partners have to associate the work done with names of individuals
- Important to have help files on the internal web site with examples so that partners can understand
- Good idea to get all partners to send to you draft electronic versions of their Cost Statements, so that you can eliminate the obvious errors



- Definition of deliverable - Annex 2 - General Conditions
- 2 types of deliverable - Annex 2 - art 4.1
  - *Contractual deliverables*
    - Periodic reports, cost statements, final report
    - Delivery date calculated respect to contract start date
    - Can be up to 2 months late
  - *Technical deliverables*
    - Supplementary reports defined in Annex I
    - Delivery date calculated respect to kick-off date
    - Must not be late



- Reassure Project Officer that all is going according to plan!
- Show progress
- Show pilot demonstrations
- Explain any changes to project objectives
- Report on resources used
- Get go-ahead to continue



- Need to decide early what needs to be presented
- Define agenda and assign responsibilities
- Give the reviewers access to the project's internal web site, let them download the deliverables and minutes they want to see
- Rehearse beforehand, go through every presentation and be the Devil's Advocate, it is amazing how even skilled presenters need practice
- Produce a single file with all the presentations, with a consistent style, the logo of the project, the logo of the partner doing the presentation
- You, the coordinator, must be the link person between the presentations, explaining to the reviewers what is coming next and why
- Make sure that you give the reviewers a full electronic copy of the final presentation when they leave the review



- Web site
- Mention Commission in publications and communications (Annex 2 - art 18.4)
- EU distribution of documents published by project (Annex 2 - art 11.5)
- Must organise project-specific events to disseminate results



- eTEN projects are not research and no development is allowed
- Market Validation projects should test the market with the embryonic product or service, and get feedback on pricing, packaging, positioning, acceptance etc
- Do not work on technical validation
- Main result of project should be to achieve “impact”
- EC want to see how the product / service will be deployed after the end of the project



- In Project Board meetings, the “Road to Abilene” must be avoided
- “Abilene” decisions are those that nobody really wanted but that nobody had the courage to stop
- Better to be unpopular than go down the wrong road



- Be transparent in your dealings with the Commission
- Discuss delays and any impact, don't hide them
- Make sure the Progress Reports go in on time. This is the barometer for the Project Officer concerning whether a project is being properly managed
- Perform internal peer reviews on deliverables, ensuring a consistent style, presentation and look. Send them in on time.
- The Commission is a bureaucracy, you can't fight it, provide the right input and eventually it will work its way through.

