



MANAGING EU PROPOSALS

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This Presentation

- 20 Minutes – feel free to ask questions at any time.
- *Not* an introduction to good management generally, but an overview of the next steps you may need to take after your proposal succeeds. *Applies to you as coordinator, not you as project partner.*
- Discussion.

Project Manager

“Management is the art of getting incompetent, lazy people to do good, useful things.” – Henry Ford

“Avoid incompetent, lazy people” - Me

Steps

After your proposal is accepted, there will be a number of steps you need to go through to get it going:

- Feedback results to the partners and clearly outline next steps.
- To prepare for negotiation phase, meet with your head of department and discuss roles and support. Find who will be doing project financial control, and go through every number with them. **If necessary, submit a revised budget ahead of the negotiation.**
- Following negotiation, a *description of work* is signed by the partners. Create a revised time line and set final project dates and arrange a kick-off meeting.
- Identify who in each partner is responsible for financial control and communicate clearly with them about requirements and responsibilities.

- At kick-off meeting, everyone usually presents their work and ideas, and administrative matters are discussed including the signing of the consortium agreement.
- Be sure to include lots of technical break-out sessions, and end the meeting with clear lists of meeting dates, milestones, requirements and responsibilities, and timings and tasks.
- As the project progresses, consider using a system like MS Project (or an open source version) to track progress and financials against projections.

“To enable the Commission to monitor the progress of the contract and ensure that it complies with the general conditions for financial support, the participants are obliged to submit periodic reports and a final report. Each project is divided into reporting periods. All reports and deliverables shall be submitted within 45 days following the end of the respective periods. For Integrated Projects and Networks of Excellence there are fixed reporting periods of 12 months. For other instruments, reporting periods are subject to negotiation and will be fixed in the contract.

The consortium shall submit the following reports to the Commission for each reporting period:

- a periodic activity report
- a periodic management report
- a report on the distribution of the Community contribution between contractors.
- supplementary reports required by any Annex to the contract.
- Audit certificates for each contractor, if required by the contract

The consortium shall submit the following reports to the Commission after the end of the project:

- a final activity report
- a final management report
- a report on the distribution of the Community financial contribution between contractors
- supplementary reports required by any Annex of the contract”

- **Clear and constant communication is your only friend.**
- Fix problems early, *like in the proposal stage.*
- Your colleagues are not children. Tell them clearly what will have to happen if trouble occurs. Don't try to be everyone's friend. Know some partners will have to go.
- Prepare to be blamed. For everything. Stay calm.
- Seek help, especially from your organisation's finance department. EU forms and *reporting* requirements change constantly, so leave it to the experts.
- Prepare early, and think always of quality and quality control.
- Describe processes to people, not outcomes.
- Prepare to be wrong and do everything twice.
- *Numbers are not your friends, enlist lots of help.* The average number of times finances need to be checked is 8.
- *Forget crazy shit like PRINCE-II and Six-Sigma.*

What Goes Wrong?

Many of these should appear in the proposal's *Risk Table*, and here they are again.

- Partners, task leaders, and researchers leave the project, sometimes before the project even starts. (Plan early.)
- SME or industry only signed to help you out, or only want the money. (Be realistic.)
- Priorities change, people are overworked, lazy, and stupid.
- Misunderstandings about the goals of the project arise. IP rights are difficult to manage. (Stick to common sense.)
- The proposal was crap, and so the project is crap. How to rescue it? (Know your own success conditions.)
- Famous people and big companies do nothing once they have the money coming in. (Of 14 well known partners, 8 may have to leave.)
- **Audits...**

Some Tips

- Be honest with your PO about problems you are having, and ask for advice directly. Your PO wants you to succeed.
- Seek help within your organisation from people who have been there and done it already.
- Acknowledge that things will go wrong, some partners may have to leave, and the schedule will need to be revised.
- Understand that the coordinator is responsible for the money.
- Communicate constantly.
- Know that sometimes your role will be to play the villain.
- Understand what motivates people and what their success conditions are for the work; these differ very much.
- Write everything down and email decisions to everyone involved.
- Make the project transparent, exciting, and fun.
- Fix problems early and often. Lead through hard work.

Remember This

- Good management is easy if you have a good team, so create a good consortium.
- A good consortium *wants* to do the work and will require little management.
- A good proposal requires little change and on-going management.
- Your partners do not work for you, all you can do is help create an environment for the right things to happen.
- Think of the future, and plan for the next big thing...

***A good consortium and proposal manage themselves.
Start there.***

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QUESTIONS?

