

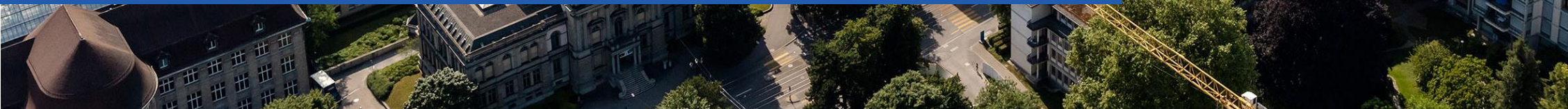


Navigating the External Kick-Off: Effective Strategies for EU Funded Projects

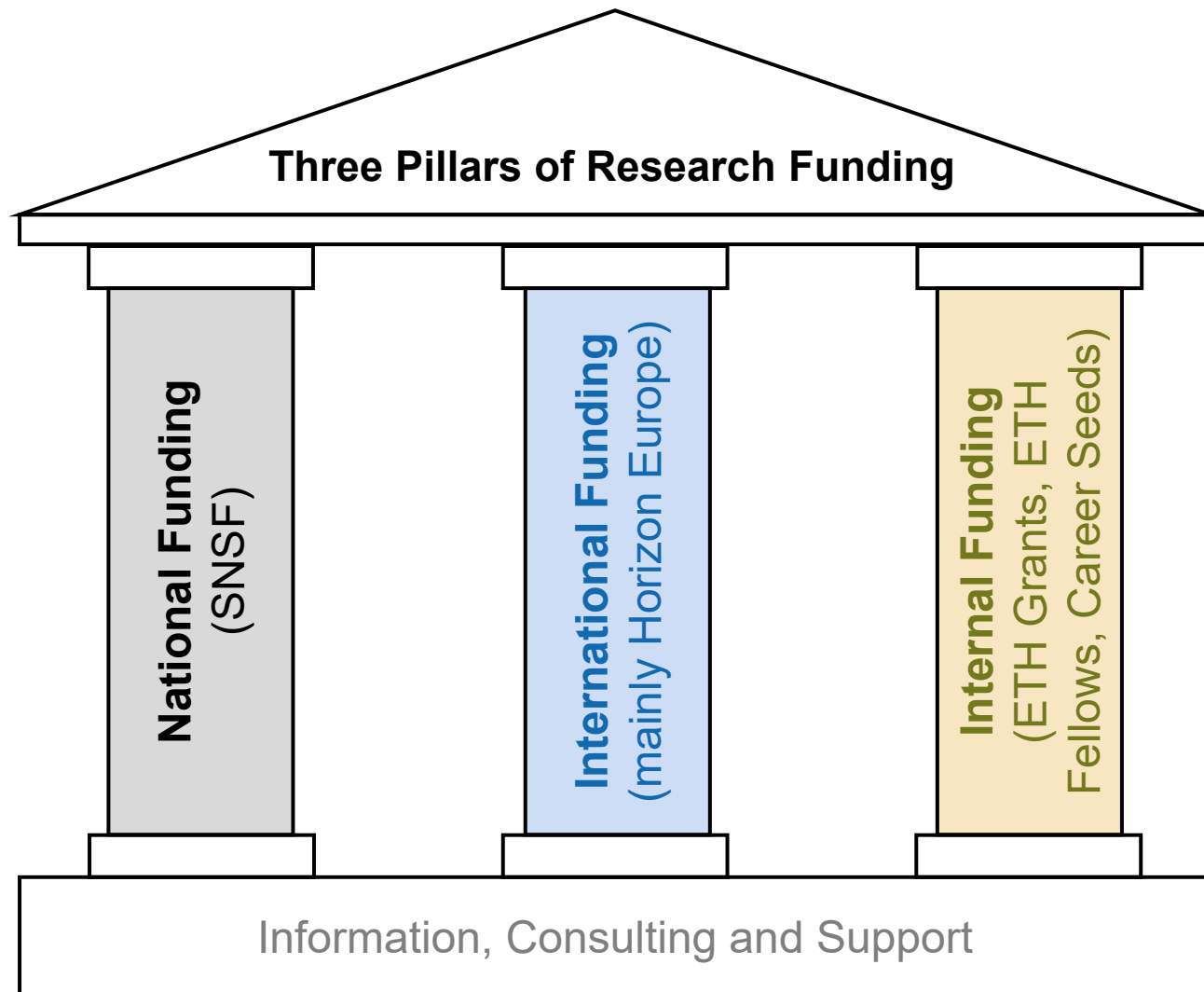
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Research Consultants

02. April 2025, online



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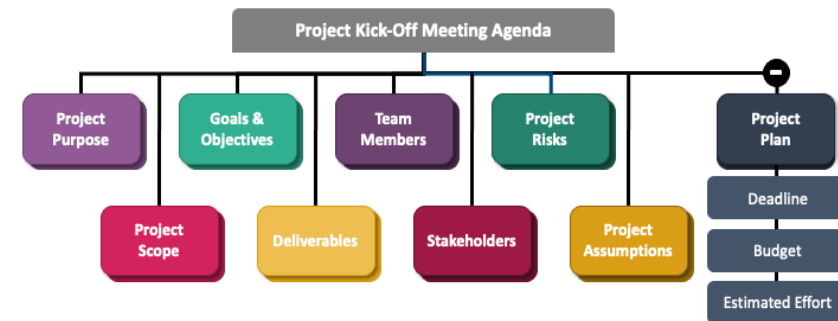
<https://grantsoffice.ethz.ch/>

Agenda

1. Welcome and Introduction
2. Project Overview
3. Roles and Responsibilities
4. Work Package (WP) Introductions
5. Meeting Schedule and Communication
6. Contracts and Legal Aspects
7. Project Management Process
8. Budgeting and Resource Management
9. Risk Management
10. Training and Capacity Building
11. Stakeholder Management
12. Q&A and Closing Remarks

PROJECT KICK OFF

Project Kick-Off Meeting Agenda



<https://www.sketchbubble.com/en/presentation-project-kick-off.html>

Project Overview

- Congratulations – you got the project
- Lets get to work!
- What are we doing over the next years?
- Why are we doing this? -> Background information
- Who do we work with?

Cover among others:

- Previous experiences and expertise
- Expectations and risks
- Objectives of the project
- Work packages and tasks – involve partners
- Timeline and milestones
- Resources

Grant Agreement number: 101017008 — HARMONY — H2020-ICT-2019-20 / H2020-ICT-2020-2
 Associated with document ID: 101017008-2020-2



GRANT AGREEMENT

NUMBER 101017008 — HARMONY

This Agreement ('the Agreement') is between the following parties:

on the one part,

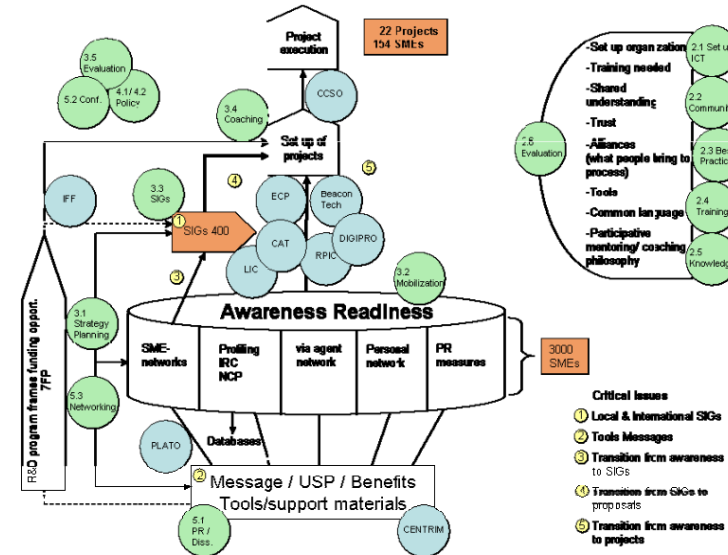
the European Union ('the EU'), represented by the European Commission ('the Commission'), represented for the purposes of signature of this Agreement by Acting Head of Unit, Authorised Representative of the Director General, Directorate-General for Communications Networks, Content and Technology, Artificial Intelligence and Digital Industry, Administration and Finance, Paolo GARELLO,

and

on the other part,

I. 'the coordinator':

Understanding the described activities, making sure everyone knows what to do



Example from smE-MPOWER

Roles and Responsibilities – a sample structure

Coordinator

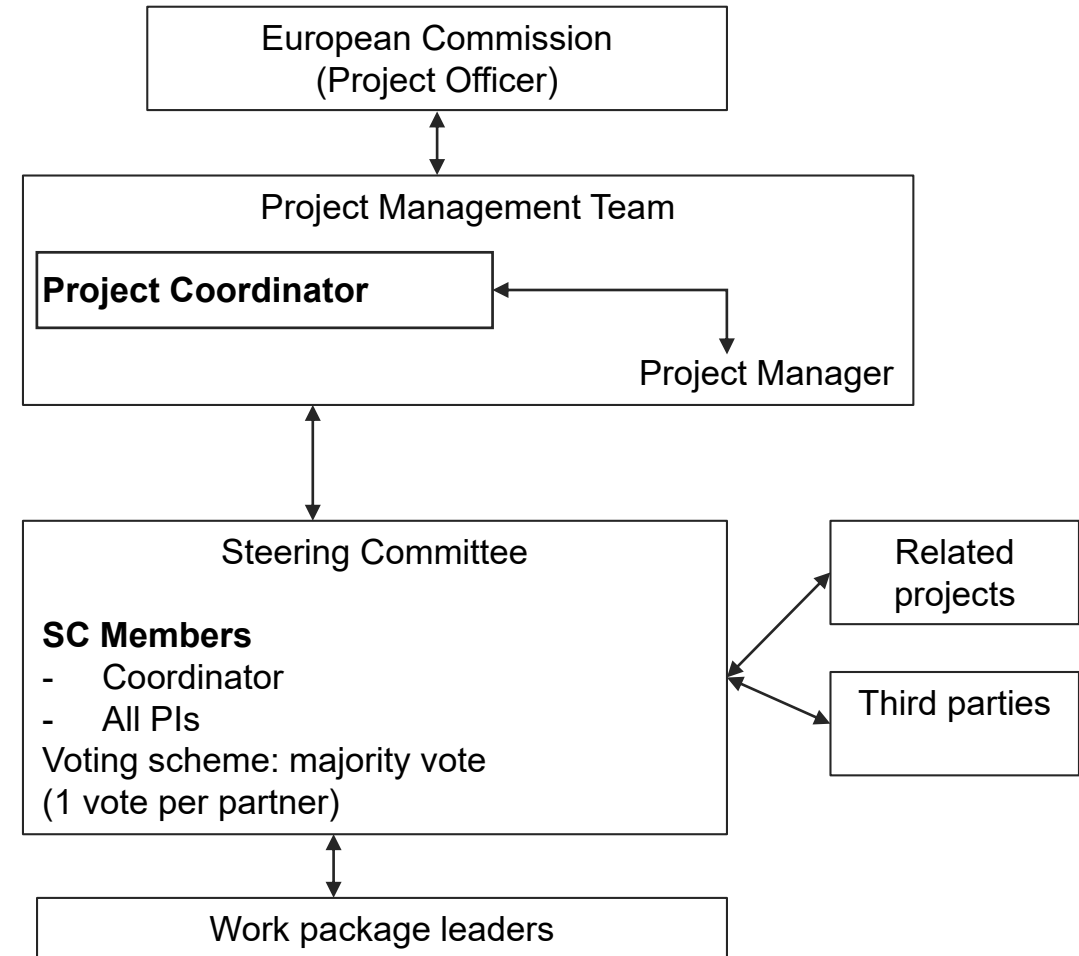
- Overall project strategy
- Technical coordination of the project
- Supervision of WPs
- Chairing meetings

Administrative Manager

- Monitoring of deliverables
- Overview of reporting
- Logistics of consortium meetings
- Management tools
- EU Contact management (PO)

WP Package Leaders

- Responsibility for progress and fulfillment of WPs
- Deliverables / Milestones of WPs



Work package (WP) Introductions – Typical structure for a collaborative project

- **WP1:** Project Management and Coordination
- **WP2-WP6:** Scientific WPs, with a different WP leader, based on expertise
- **WP7:** Dissemination and Communication
- **WP8:** Exploitation and Commercialization (depending on TRL)
- **WP9:** Ethics (depending on scope of project)

A WP consists of the following:

- WP leader
- WP contributors
- Scope
- Deliverables based on tasks and sub-tasks
- Milestones

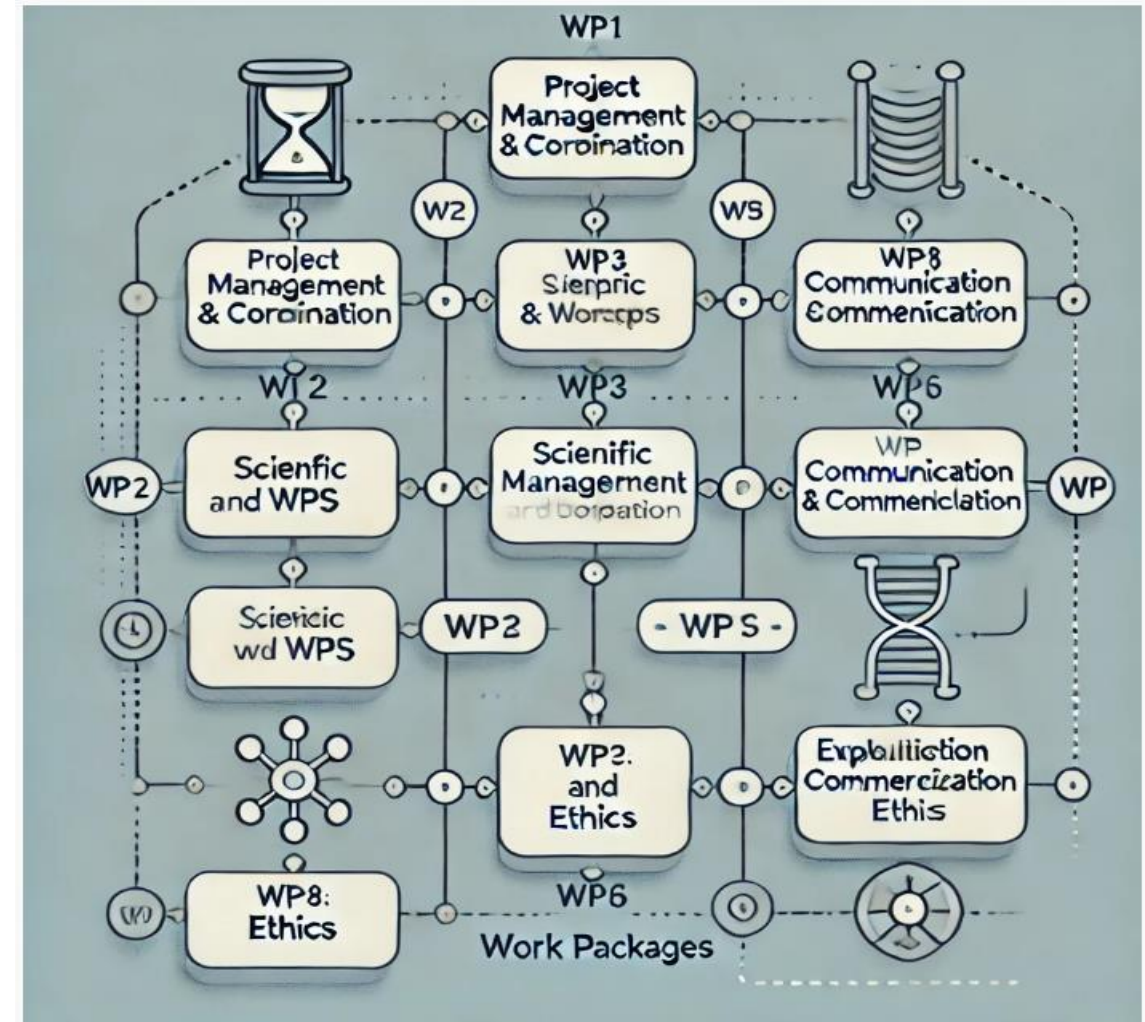
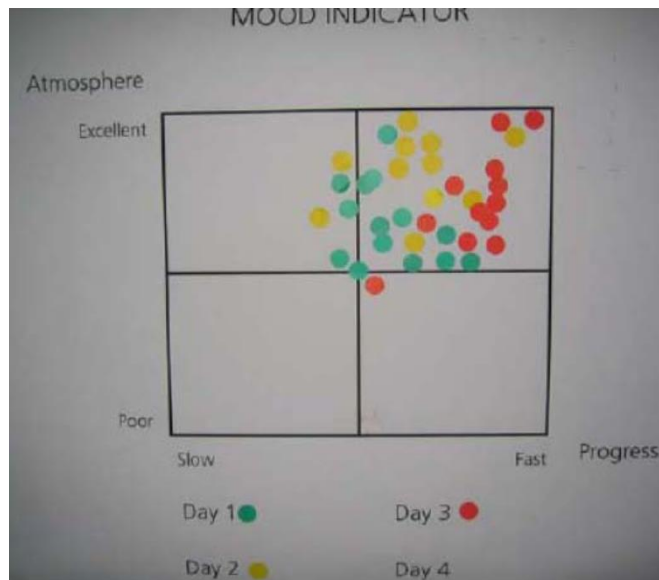


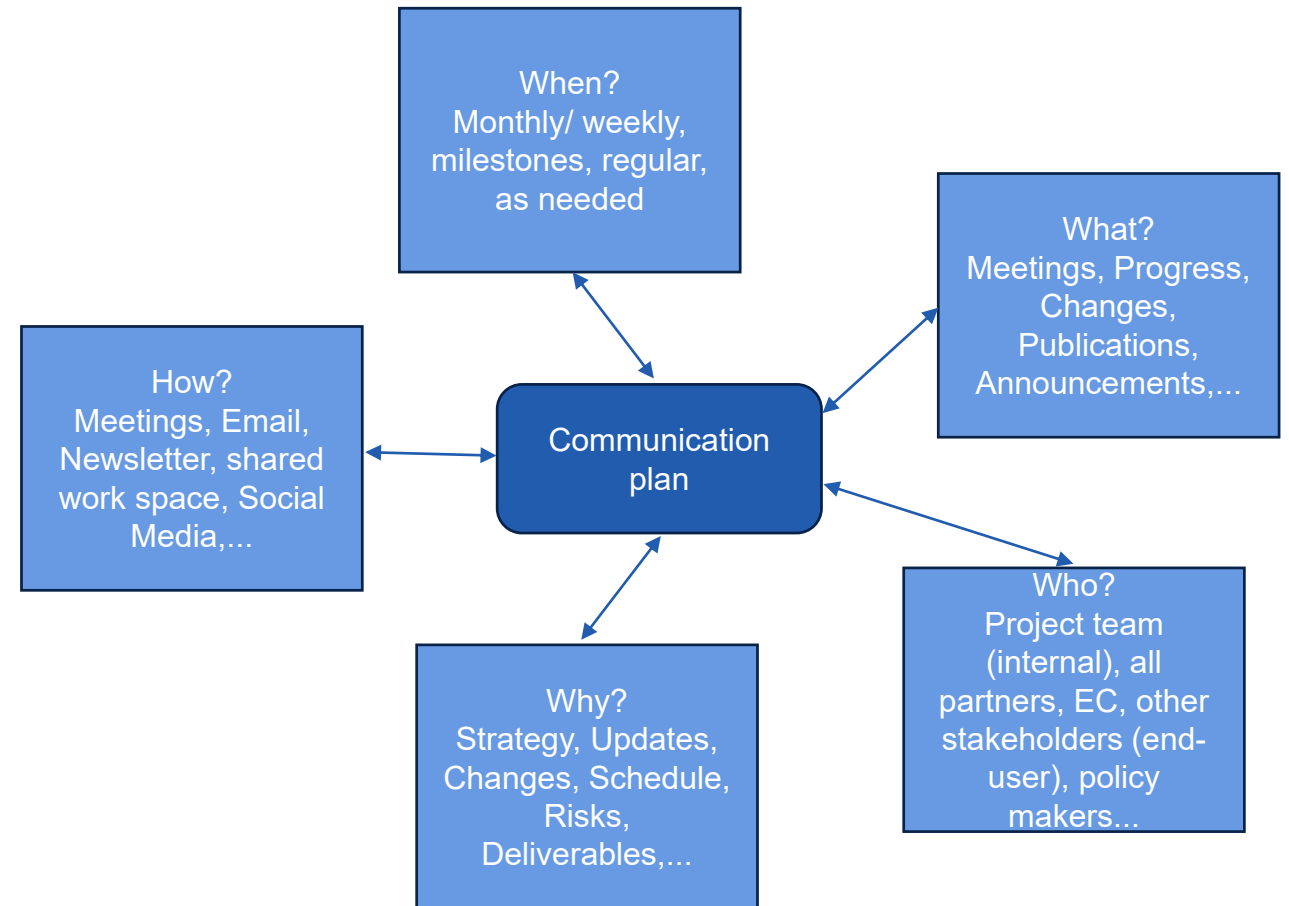
Image prepared using AI

Meeting Schedules and Communication

- Good mix of in-person and online
- Joint calendar
- Rather more than too little (GAs, SC, WGs, other team constellations)
- Only those who are needed



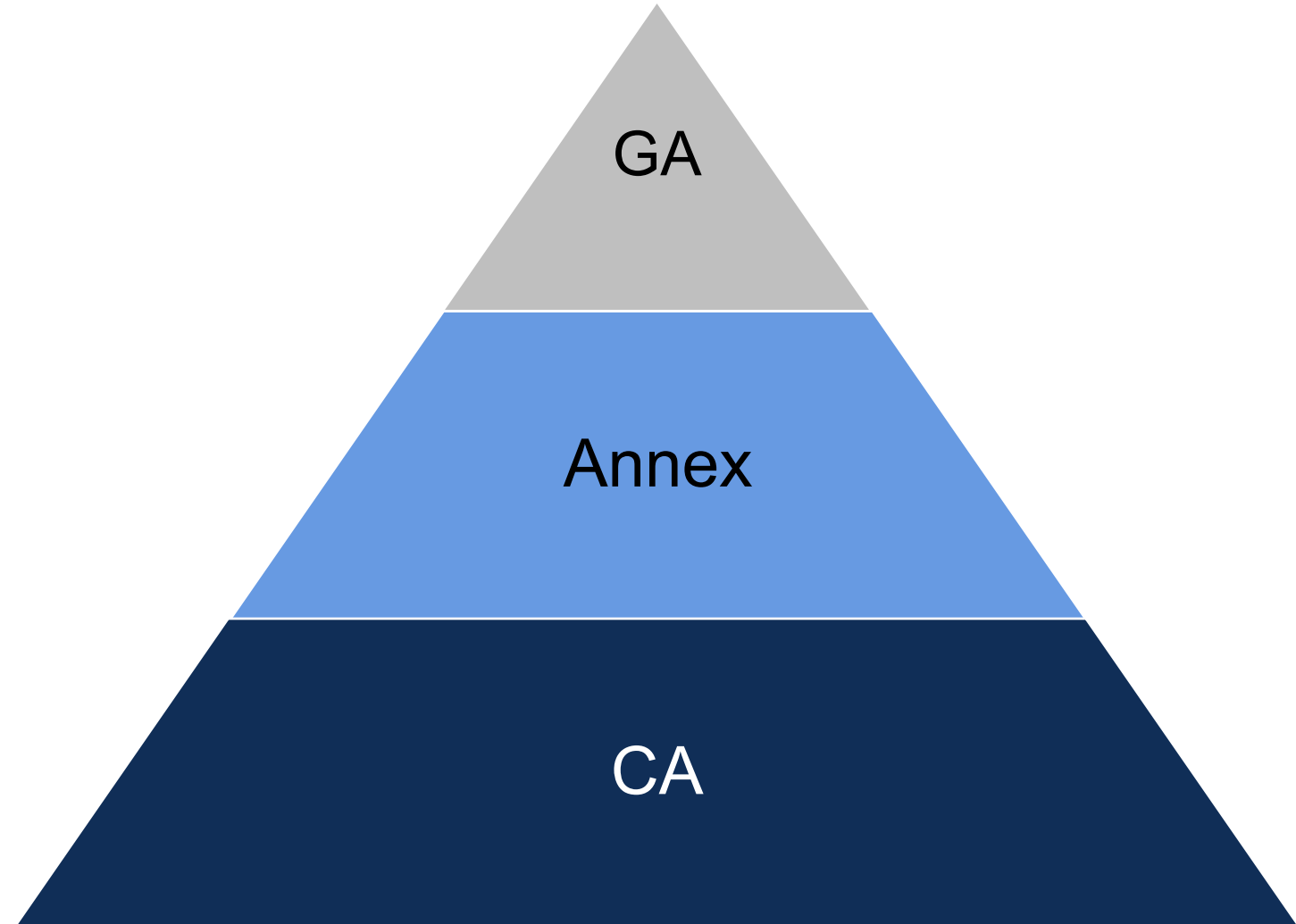
Example from smE-MPOWER



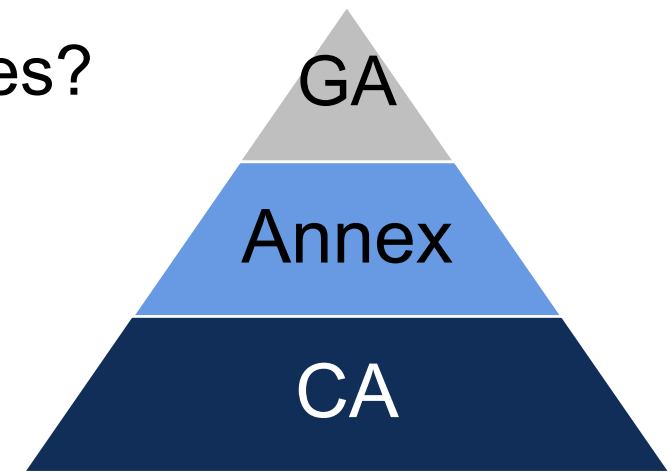
Contracts and Legal Aspects – what are these?

- What is a Grant Agreement?
- What is an Annex?
- What is a Consortium Agreement?

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Contracts and Legal Aspects – the most important clauses?



Section 5: Liability – limitations

«For any remaining contractual liability, a **Party's aggregate liability** towards the other Parties collectively shall be limited to once the Party's share of the total costs of the Project as identified in Annex 2 of the Grant Agreement provided such damage was not caused by a wilful act or gross negligence.»

Section 7: Finances

«Funding of costs included in the Consortium Plan **will be paid to Parties after receipt from the Funding Authority without undue delay** and in conformity with the provisions of the Grant Agreement. Costs accepted by the Funding Authority will be paid to the Party concerned.»

Section 8: Results

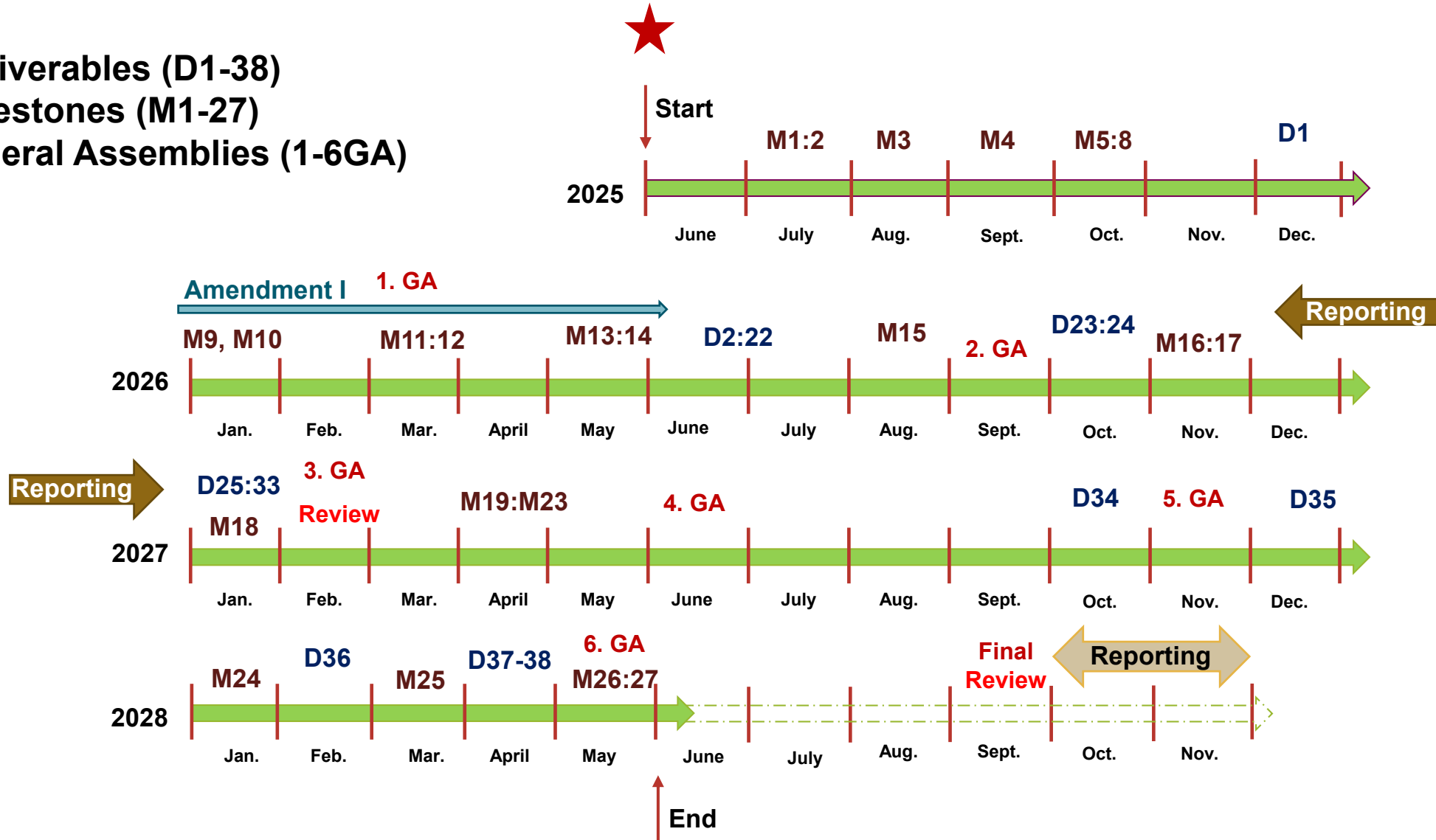
«**Results are owned by the Party that generates them.**»

Joint ownership is governed by Grant Agreement Article 16.4 and its Annex 5, Section Ownership of results, with the following additions.

- each of the joint owners shall be entitled to use their jointly owned Results **for non-commercial research and teaching activities** on a royalty-free basis, and without requiring the prior consent of the other joint owner(s).
- each of the joint owners shall be entitled to otherwise **Exploit the jointly owned Results** and to grant non-exclusive licenses to third parties (without any right to sub-license), if the other joint owners are given: (a) at least 45 calendar days advance notice; and (b) fair and reasonable compensation.»

Project Management Process - Overview

38 Deliverables (D1-38)
 27 Milestones (M1-27)
 6 General Assemblies (1-6GA)



Project Management Process – Typical TO DOs

- **Basic TO DOs (continuous)**

- Ensure work on WPs you lead and/or are a part of run smoothly
- Ensure your deliverables are prepared in good qualities
- Do not forget about the milestones!
- Ensure you do not breach the CA / GA!
- Financial management
- Time management!

- Peace of advice: listen to your project manager – they know better!

- **Additional TO DOs (continuous and on notice)**

Every Partner: provide information regarding

Publications – *all publications need to be listed at the portal*

Critical risks – *please review these and get back to us if any risks have occurred*

Dissemination and communication activities – *conferences, workshops, press releases, but also: No of persons reached via such activities*

Possibly, IPRs and Innovations

Gender balance

Additionally, for SMEs

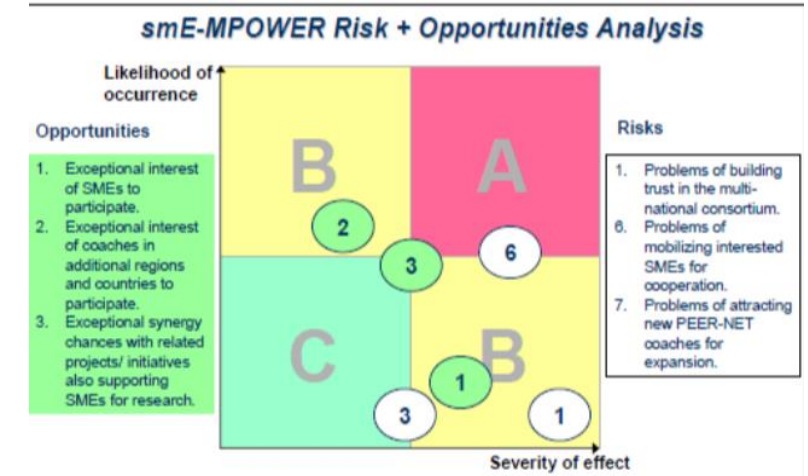
Information on turnover

Number of employees

Risk Management

- Examine risks from the proposal / DoA
 - Are they still valid?
 - Has anything changed?
- Devote time to discuss risks and mitigation measures
- Think about opportunities as well
- Address realistic scenarios
- Internal & external (use [PESTLE analysis](#) as basis, provides also input for Stakeholders)

#	Risks	Measures of Prevention and Contingency
1	Problems of building trustful cooperation among the PEER-NET Community due to differences in background, culture or expectations from the project.	Plan enough time for the initial establishment of relationships. Initiate trust through participative consensus-driven leadership. Plan an extensive kick-off meeting of 4 days for laying solid project foundations. Solidify trust through a Consortium Agreement, an agreed Code of Conduct, fair and transparent Community Leadership and clarity on all IPR and potential exploitation issues.
2	Problems of defining complementary and synergistic competences among the PEER-NET Community due to differences in services offered to different clients in the various regional backgrounds.	Plan enough time for active listening in order to understand each other thoroughly and the background and context of each other's services and regional challenges. Facilitate an understanding of differences as assets of the international community and utilize these to achieve European validity wherever possible.
3	Conflicts arising from different perceptions of priorities among the consortium partners.	Pursue consortium consensus in participative moderated workshops. If consensus cannot be found, employ mediation for settlement of conflicts.
4	Problems of implementation of the collaboration platform: KBT and KLB to support the PEER-NET Community.	Ensure everyone understands the concepts and collaboration philosophy underlying the collaboration technologies KBT and KLB and adjust to the direct daily working needs and application cases of the different users.
5	Problems of technological compatibility and stability leading to interruptions in workflow and hindered communication.	Switch to other software platforms which offer the basic needed functionalities for the time needed to fix the problems with the collaboration ICT.



Examples from smE-MPOWER project

Coping with Risks in first Year (internal)

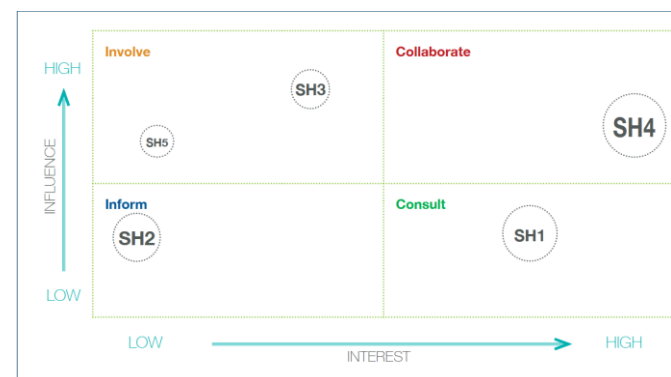
- ↳ Specification of the TIG Process more difficult than expected
 - WHY?
 - ⇒ Knowledge Board SIG concept not transferable → from scratch design of new process necessary;
 - ⇒ Pioneering new ground here, trying to bridge innovation interested SMEs internationally around topics of interest
 - REACTION
 - ⇒ Additional development work seeking consensus to build a strong approach for the future. Develop TIGs for the middle term, and prioritize SIGs for the short term to answer first FP7 calls.
- ↳ Trifold development took more time than expected
 - WHY?
 - ⇒ Communication difficulties in large consortium, especially on sensitive issue like PR
 - ⇒ Taking serious the need for target-group sensitive promotion material (Message, USP, Offer, Design)
 - REACTION
 - ⇒ Set up dissemination group with phone conferences as international task force instead of dispersed email
 - ⇒ As overall budget figures from EC side kept changing (72-48-50) the delay was in our favour ☺

Stakeholder Management

- "A stakeholder is any person or group who influences or is influenced by the research"
- Distinguish between internal and external stakeholders
- Why it is important:
 - Promote links -> science – society
 - Involve end-users early in the project
 - Learning and empowerment
 - Build trust
 - Access to knowledge
 - Improved dissemination
 - ...

STAKEHOLDER	CATEGORY (E.G. GOVERNMENT DEPT., GENERAL PUBLIC, NGO, POTENTIAL PARTNER)	REASONS TO INVOLVE THE STAKEHOLDER(S)	WHY THE STAKEHOLDER MAY WANT TO BE INVOLVED (BENEFITS)
Local authority	Government policy maker	Strengthen science-policy interface and ensure relevance of research outputs.	Opportunity to develop better policies based upon rigorous scientific knowledge. Better transparency of decisions made.
Local business	Private sector businesses	Sharing technical expertise and potential contribution of resources to project.	Possibility of networking with potential new customers through the engagement process. Publicity and Corporate Social Responsibility opportunities. Improving efficiency and profitability of operations.

Stakeholder (by sector)	Contact/ position	Roles and interests	Level of engagement	Importance Influence
<i>e.g. Private sector</i>				
Stakeholder A	Person A	Owner/ manager	Involved/consulted	High
Stakeholder B	Person B	Consultant	Informed	Low



[Examples & definition from BiodivERsA Stakeholder Management Handbook](#)

Relations with PESTLE, risks and communication

Q&A and Closing remarks

- Involve a project manager already during the proposal phase
- Very carefully consider what deliverables and milestones a project needs (not too many, not too few)
- Involve
 - Your grants offices, legal advisors, tech transfers, finance departments on time
 - Relevant stakeholders ahead of time
- Clarify expectations in advance
- Time management is precious!
 - Meetings: online and onsite mix
 - Budget management
 - Deadlines: announce way in advance
- Participate in online trainings
- If you don't know something, ask! *This is an ongoing process, there is always something new to learn!*

Questions



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