

Second Meeting of the WG 2 Finance COST Targeted Network TN1302: BESTPRAC

WG2 – Finance

Meeting in Bratislava: 25 participants of 17 different countries

TOPIC 1. Definition of administration of EU projects: tasks performed and skills and competences needed

TASK PERFORMED

Results of WG2 Survey Task Matrix2: discussion in 4 subgroups led by:

Per Inge Andresen, Norwegian University of Science and Technology

Dirk De Craemer, Ghent University

Geraldine Leonard, Université d'Orleans

Marguerite Auberger, Centre de Recherche Public - Gabriel Lippmann, Belvaux

The 4 Subgroups reached a consensus on the results' of the questionnaire and on the picture of the next slides : activities of research administrators, (in red the activities rarely managed)



Teaching activities	<ul style="list-style-type: none"> internal workshop with the researchers about funding instruments Internal workshop with administrative personnel about funding management
Regulation activities	<ul style="list-style-type: none"> Writing of internal Guidelines on proposal preparation and budget tools Writing of internal guidelines on project management
Search for/Disseminate funding opportunities	

Pre -award

Support in:

- understanding documentation and rules for submission
- writing administrative part of the proposal
- writing **scientific part of the proposal**
- budget definition
- obtaining necessary authorizations (signature or internal approvals)
- proposal submission

NEGOTIATION

Support in

- rewriting proposal according evaluation form
- in budget remodulation
- in writing/revising Consortium Agreement
- preparing documents for the GA
- Analyses of Grant Agreement

Post- Award

MANAGEMENT

Support in:

- identifying eligible costs
- the timesheets production procedure
- budget remodulations and request of information to EC
- **Use of the project resources (doing purchases according researchers' requests)**
- Participating in project meeting
- Using electronic systems

REPORT

Support in

- writing Financial Report
- writing **Scientific report**
- obtaining signatures and in submitting it

AMENDMENT

Support in the amendment request procedures

Audit

AUDIT

Support in:

- obtaining certificates on financial statements
- In case of EC Audit

All the activities of research administrators:
in red those rarerly managed

Topic 1: Project administration requires a spectrum of skills and competences not only technical (F, A, L):

- capacity to understand complex text
- service mentality
- enjoying administrative tasks
- well organised
- high tolerance for frustration
- Communication skills
- Team player
- interlinked (researchers/administration)
- independency from PI
- experience (different backgrounds)
- critical mass
- Learning by doing
- Capacity to translate EU regulation in national/internal regulation

Consensus reached on the skills identified during the last meeting and on the results presented by the subgroup led by Geraldine Leonard, Université d'Orleans, on the competences needed for each phase



Teaching activities communication skills, experience on european project, capacities to understand complex texte, know the guidelines and rule

Regulation activities writing skills, simplify texts,

Search for/Disseminate funding opportunities : **Understanding of different calls and regulations. Should have some experience to know what he's reading, to prepare the guidelines for this call. Newsletter**

Pre -award

SKILLS

- prepare guidelines, newsletter, communication skills, well-organized
- accountancy knowledge, to know financial rules of EU and our institution, experience of European projects (maybe FP7 and know the news on H2020)
- understand the internal process, be diplomatic to know the administration part (PIC number)

NEGOTIATION

be diplomatic, communication, understand the text, reactive, lot of experience, communication with the coordinator

Post- Award

MANAGEMENT

high tollerance of frustration, well-organized, important to read the document, be flexible

REPORT

accountancy skills, well-organized, communications skills with the researcher and lab., high tollerance of frustration, link the financial report with the scientific report, be reactive

AMENDMENT

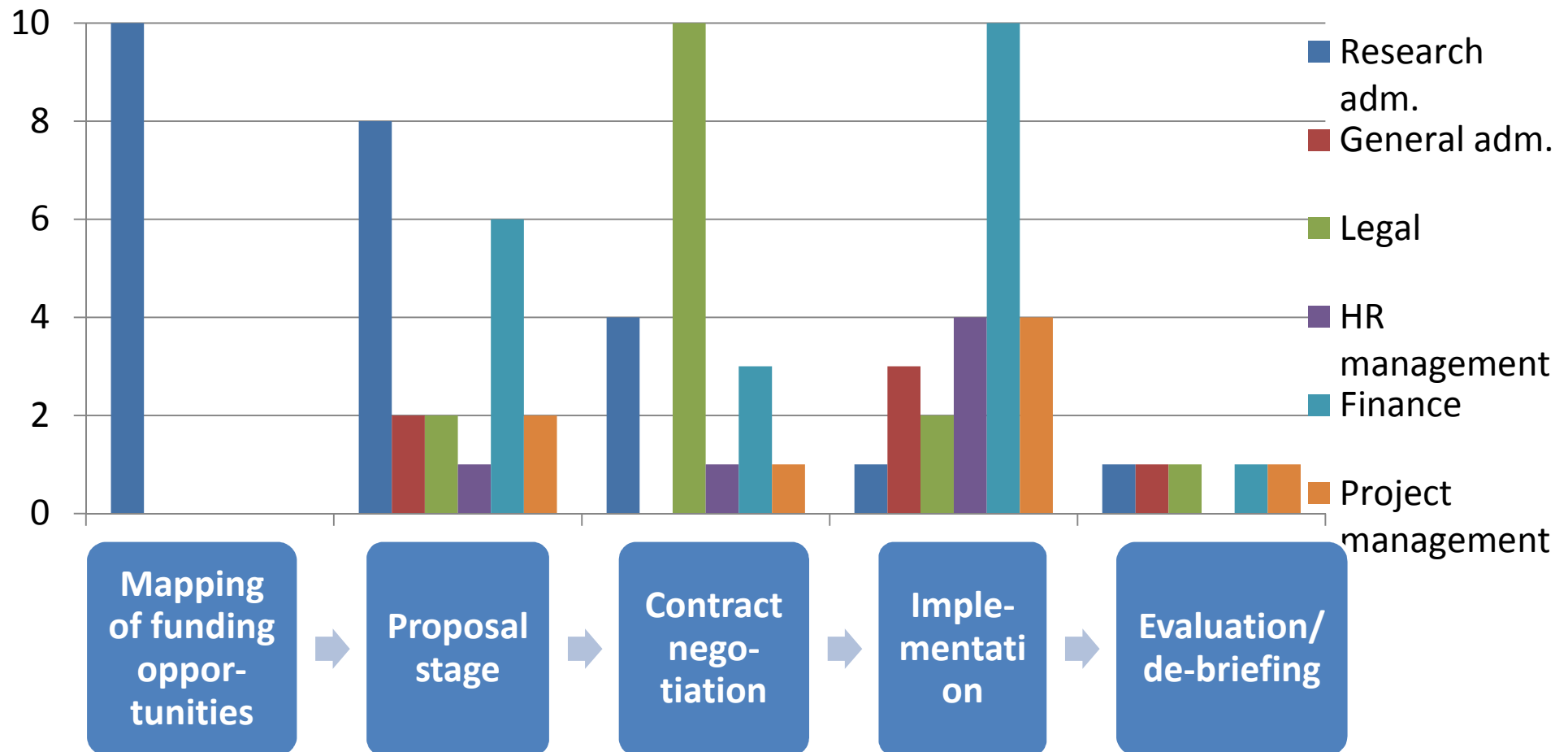
understanding national law and international regulation

Audit

well-organized, prepare the lab and researcher, checked if all documents are (timesheets, ...), prepare also a pre-audit before the EC audit (explain and translate), financial skills



- TOPIC 1. Definition of administration of EU projects: tasks performed and skills and competences needed: Case Study: Per Inge Adresen, Norwegian University of Science and Technology “Competence areas and project life cycle”**





Topic 2: identification of difficulties administrators are confronted with in dealing with European projects

- ✓ One size fits all (same system)
- ✓ Overhead (incentives, ..): new deadline for the survey : **30.10.2014**
- ✓ allocation: direct vs indirect costs
- ✓ personnel costs
- ✓ Budgeting
- SMEs involvement
- Reporting (ad hoc requirements)
- Third parties
- Subcontracting
- Templates (checklist , guidelines)
- **Exchange rates**
- **Accounting practices**
- Internal approval procedures: signature procedure/post award phase
- **VAT**



Topic 2: Difficulties to be addressed by which means

Results' of WG 2 questionnaire:

One size fits all (same system): same rules and systems/schemes for all European Programmes

Per Inge Andresen, Norwegian University of Science and Technology

Allocation: direct vs indirect costs

Dirk De Craemer, Ghent University

Geraldine Leonard, Université d'Orleans

Best practice presentation:

Personnel Costs in H2020, Geraldine Leonard, Université d'Orleans

Budgeting in H2020, Per Inge Andresen, Norwegian University of Science and Technology



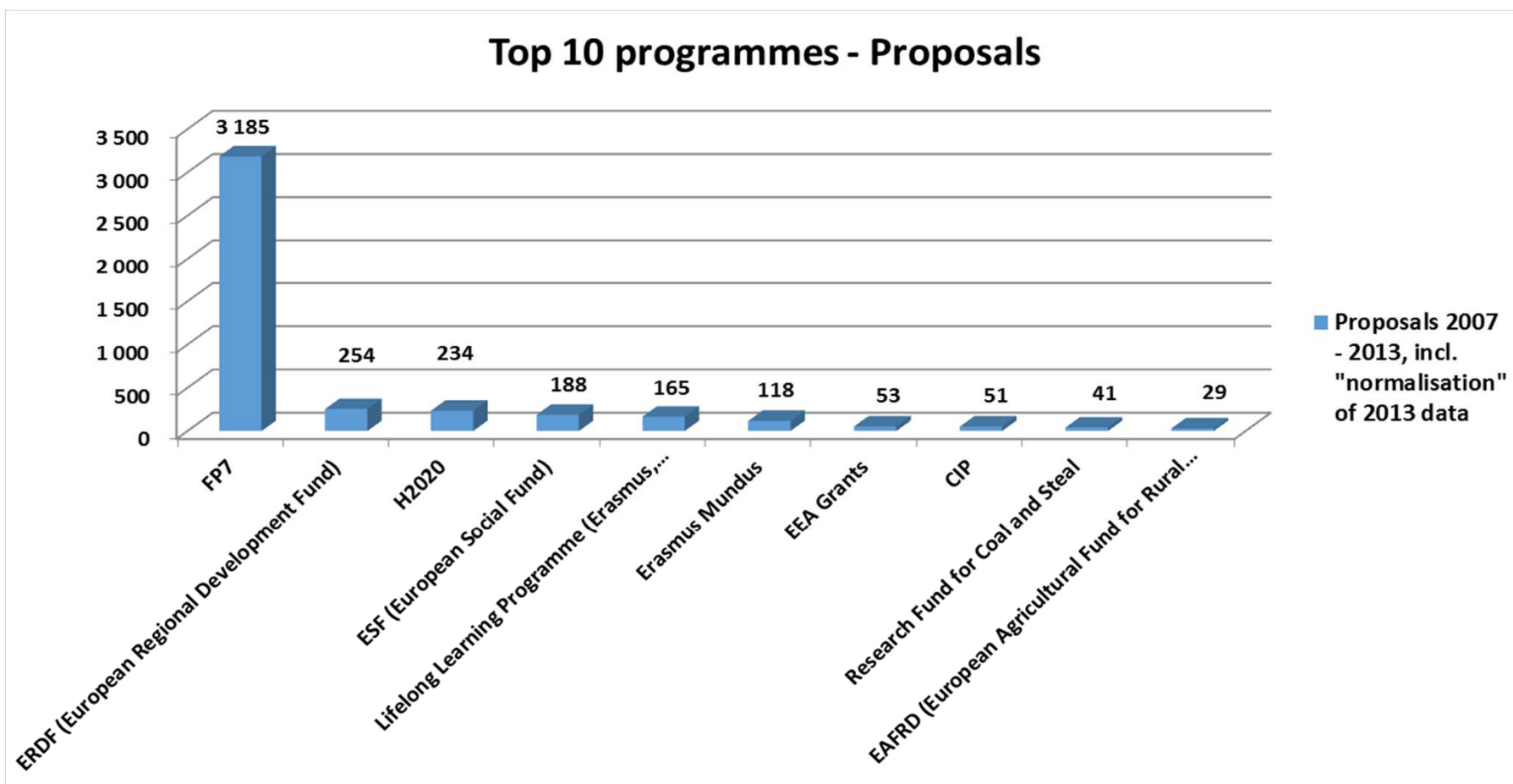
One size fits all (same system): same rules and systems/schemes for all European Programmes, Per Inge Andresen, Norwegian University of Science and Technology

Sample	
Programmes in distributed questionnaire	44
Programmes added by respondents	24
Total sample size - programmes	68
Sample size - organisations	14

Proposals/projects 2007 - 2013, incl. "conversion" of 2013 data	Proposals	Projects
Total number of programmes w/projects or proposals among survey respondents	58	51
Programmes with more than 5 projects or proposals in total	32	22
Average number of projects/proposals per programme	80	32



**One size fits all (same system): same rules and systems/schemes for all European Programmes,
Per Inge Andresen, Norwegian University of Science and Technology**



Next steps:

Open point (decided after discussion in 4 subgroups chaired by Per Inge, Dirk, Marguerite, Geraldine): major issues selected to be analyzed and discussed in the next meeting:

Personnel Costs in H 2020: - "additional remuneration" : **Katarzyna Markiewicz-Śliwa, Silesian University of Technology, Jaco de Graaf, Leids Universitair Medisch Centrum**

Direct vs indirect : List of open points and solutions: **Dirk De Craemer , Ghent University**

Optimisation of indirect" Large Infrastructures": Case Study:**Per Inge Andresen, Norwegian University of Science and Technology**

Reinforcing the network, sharing documentation and disseminate: **Sonja Alles, Leibniz Universitaet Hannover**

Working with other WG (on "Third parties and time recording"): **Vanessa Ravagni, University of Trento**

Survey "Use of overheads": Results' presentation: **Cristina Velasco, University of Madrid Carlos III, Maddalena Tognola, University of Bern**