

Daniel Gyori – STSM Final Report – visit at UCL (COST ACTION NO TN1302-26911)

1. Summary

The STSM BESTPRAC is aimed at supporting individual mobility and at strengthening the existing networks and fostering collaborations by allowing - in particular - early stage administrators to visit an institution in another participating COST Country.

I visited the University College London's (UCL) European Research and Innovation Office (ERIO). My visit was taking place between the 28th September and 2nd October. UCL is one of the most successful universities in Europe in terms of EC funded research projects. I was able to learn from professionals working in this central research support office. It was a great opportunity to discover differences and similarities between ERIO and our office.

I learned about UCL in general, its key financial targets within Horizon 2020 and research diversification strategy. The training covered both the proposal management and project management phase of a research project including topics such as budget planning and proposal development, staff cost calculations through project management, recording expenses, reporting and audit.

The most important difference between my institution (CEU) and UCL is the size. UCL is a huge university with 4 Schools, 11 Faculties and a lots of departments. ERIO's organizational structure was designed to the university's size. This means that the responsibilities and tasks are shared by schools and faculties, and by project stages, not by funding schemes. Everyone is focused on a specified stage of the whole proposal and project management process.

The way they are organising the work is very structured, the scope of responsibilities within the department is very well-defined. The financial team works physically next to ERIO which is a great opportunity for personal meetings in case of project issues. The close cooperation with the financial post-award team is a great advantage compared to other universities where the central financial department is not closely connected to the project management office.

2. Purposes of my STSM

- **To learn of the best practices in EU research project management from experienced project and budget administrators at UCL.** This goal is fulfilled. I had the chance to meet very experienced managers.

- **To familiarize with internal procedures pertaining to proposal and project management.** This goal is also fulfilled. Everyone I met explained the procedures in details and they answered to my questions regarding internal procedures.
- **Meeting with and learning from various professionals from different departments involved in project management.** This aim is also fulfilled. I met people from all of the subgroups of ERIO and I also met a financial professional at the Post-award team.
- **Job shadowing.** This is fulfilled too. I had a desk and computer and system login pass during my visit, I was able to watch and listen the colleagues during the work time.

Here is my weekly schedule:

Date	Activities
Monday 28 th	10:30 – Discussion about expectations, walk around the campus 12:30 – Lunch together with Head of Project Services
Tuesday 29 th	9:30 – UCL relationships and policies <ul style="list-style-type: none"> ● Meeting with the Head of Project Services <ul style="list-style-type: none"> - ERIO-UCL relationship (general policies, UCL strategy, Open access, etc.) - ERIO-external relationship (twitter, other activities) 11:00 – Contract management at UCL <ul style="list-style-type: none"> ● Meeting with the Contract management team <ul style="list-style-type: none"> - the Contract management team’s activities - Contract management of ERC Grants
Wednesday 30 th	9:30 – Proposal Services <ul style="list-style-type: none"> ● Meeting with a European Proposal Manager <ul style="list-style-type: none"> - About the services in general - Pre-award issues: awareness-raising, applications, approvals, costing (budget planning and proposal development, cost calculations)
Thursday 1 st	11:00 – Reporting and Audits <ul style="list-style-type: none"> ● Meeting with an EC policy manager <ul style="list-style-type: none"> - FP7 and ERC reporting and

	<p style="text-align: center;">audits</p> <p>13:00 – Project Management Services</p> <ul style="list-style-type: none"> ● Meeting with an European Project Manager <ul style="list-style-type: none"> - Service presentation - Post-award issues: negotiations, cost monitoring, expense monitoring
Friday 2 nd	<p>14:00 - Further discussion about ERC projects</p> <ul style="list-style-type: none"> ● Meeting with an European Contract Manager <ul style="list-style-type: none"> - Clarification questions regarding the structure of job sharing within ERIO from ERC project perspective

3. Detailed description of the work carried out during the STSM

Summary of the most important knowledge gained.

Day 1.

One of the European Project Managers was appointed to organize my meetings and guiding me during my visit.

The first day was mostly for introducing everyone to me in the office. We also walked around the campus and had lunch together with the Head of Project Services.

Day 2.

UCL relationships, policies

- UCL research policies are adjusted to H2020's pillars and goals (e.g. project and technology oriented projects, focus on SME's). That's why UCL tries to involve more and more SME's in H2020 projects. UCL is an important member of the Vision2020 online network, which is for the involvement of SME's and academic partners. This online platform is one of the biggest partner searching tool in Europe.

Other major things I could hear about on this meeting:

- ERIO hires project managers in order to have people in the team who are familiar with all aspects and stages of the research projects (pre- and post-award issues).
- ERIO is working in close cooperation with the Post-Award team of the Finance and Business Affairs Office, especially in case of UCL coordinated projects.
- ERIO has daily contact with the departmental project coordinators and PIs too.

- Beside ERIO, UCL also hires research facilitators at the Vice Provost of research's office
- Open Access: UCL paying a lot of attention to open access publication, because it became a new obligatory part of H2020 projects. UCL has its own new Open Access journal which is published by CEU Press. It provides a cheap opportunity for researchers to publish results.

Meeting with the contract management team

- The contract management team works in projects which are in the negotiation phase. Their role is to provide support in the creation of Consortium Agreements. They also work with amendments.
- Work shared by schools not by schemes within the contract management team.
- PI's has daily connection with the departmental coordinators. Financial matters mostly managed and planed at the departments. ERIO has the right to check everything and advice PIs if they find anything ineligible.
 - Contract management team also has a legal role in checking the Intellectual Property related chapters. UCL's legal department also deals with these issues in case ERIO asks them to do so.
 - UCL internal rule is min. 12.5% time commitment in H2020 projects. If the PI wants to work less on a project, the department head's approval is needed.
 - It is always the department's right to negotiate with PI's about the conditions of the grants (UCL leadership's approval is never needed.).
 - For creating the project budget, UCL uses an internal costing system which is designed for H2020 projects and available for the faculty members.

Day 3.

Pre-award management

- Pre-award team is the newest team within ERIO. They are project managers who are hired in order to provide professional support to researchers in the creation of proposals. Their primary role is checking whether an application fulfills the EC's and UCL's proposal requirements (eligibility check).
- They are also looking for funding matches based on the profile of researchers on UCL's website. Therefore they have close collaboration with the vice-provost's office (who are responsible for looking for opportunities).

- They also hold workshops which are an effective tool of dissemination.
- Proposal development support: UCL provides intensive support in the preparation of the core part of the proposals. They proofread proposals and make the text understandable if something is hard to understand. Therefore they re-edit the text's structure if necessary. They also pay special attention to the gender balance rule and the involvement of SMEs (this last point is a strategic aim of UCL too).
- They also investigate the technological readiness level of the proposals and asks the PI about the expected TLR level by the end of the project (if it is not far from the starting point then they ask the PI to modify the proposal if possible).

Day 4.

Reporting and Audits

- The post-award team is responsible for ERC Audit and reporting. They use Oracle system for extracting accounting data. PI's also have the access to get a report from this system about their financial project progress.
- UCL does not have any electronic time recording system, because the timesheet requirements are different in different types of projects.
- They work in close collaboration with the departments.

ERIO's post-award team

- This team is hired to follow a project from the beginning until the final report. They work mostly with collaborative projects.
- They organize kick-off meetings at UCL at the beginning of projects.
- They check the agreement from legal perspective and.
- They monitor the project from budgetary perspective.
- This team is responsible for reporting of collaborative projects too, they work on reports with the financial post-award team.
- They are also responsible for the organization of communication and dissemination activities.

Day 5.

Carrying out own work and having a clarification meeting with the Contract Management team

4. Contribution to the goals of the COST Targeted Network

My visit matches the requirements set in the BESTPRAC guidelines. I gained some financial, legal and administrative experiences at UCL and learned some best practises. I am able to use the gained knowledge in my work. I am an early stage research administrator, that's why many of the H2020 related information was completely new for me during my visit.

5. Description of the main results obtained

Results, best practises:

- The way ERIO works will inspire me in the organization of my own tasks at CEU. At my projects I will be able to think more structurally.
- I also learned some practical information about ERC projects which will help me in project management (Budget planning, Equipment purchase, rules).
- UCL has an accounting system which let the PIs download a budgetary report from the system about their projects. This would be a useful thing at CEU too. I will coordinate it with our financial department whether this option is available at our accounting system or not.
- I will be able to communicate better with huge partner universities which work similarly as UCL does because this visit gave me a better understanding of the structure of these huge grant support offices.