

Best practices for managing ICT projects in FP7

TA2 Networking Session at the ICT 2008, Lyon

Complementary information and summary of the discussion

Managing large international collaborative R&D projects is a demanding task. Project structure, management procedures and the interaction of project participants are crucial for success. This short paper, written to complement the TA2 networking session at the ICT 2008 Event, summarises some of the best practices gained from the FP6 and FP7 Integrating Projects NM2 (www.ist-nm2.org), TA2 (www.ta2-project.eu), and PII (www.panlab.net).

These best practices reflect the personal views of three highly experienced project managers: Peter Stollenmayer (coordinator of NM2 and TA2), Dr. Douglas Williams (technical manager of NM2 and TA2), and Anastasius Gavras (coordinator of PII).

Milon Gupta, Eurescom

Best practices in consortium building and proposal writing

By Anastasius Gavras, Eurescom

Best practice 1: Build a core of partners and individuals that you trust

It is of paramount importance that you know and trust a small number of partners and the individuals behind. It is very often the case that the idea for a project and its implementation critically depend on very few people. Meet these people and assess their seriousness about the project. Try to estimate their long term commitment to the idea.

Best practice 2: Recognise that collaboration is a process

Collaborating parties must understand the key elements of this process. Collaboration requires parity (in the broader sense) among the participants and is based on mutual goals. It depends on shared responsibility for participation and decision making since it is based on shared resources, which in turn means accountability for outcomes. These key elements are what essentially distinguish collaboration as the highly interdependent and engaging process that it is, a process that requires an upfront commitment to work within these elements from all participating entities before going forward.

Best practice 3: Rely on professional and experienced project management

Project management is not magic. However, if you are a scientist or engineer concentrate on your core competence. It is most efficient and effective to engage a professional and experienced project manager for the routine work of management. This routine is invaluable for most of the daily micro-processes that need to be managed in a collaboration. If you are a project manager, avoid any experiments with exotic project structures and procedures. Learn as you go about what worked and what didn't. Do it better next time.

Best practices in management and reporting

By Peter Stollenmayer, Eurescom

Best practice 1: Split between technical and administrative project management

The technical and the administrative management of a project are different roles and require different skills. There is a significant benefit in splitting those roles between different people. None of the two roles should be underestimated. The technical management has mainly to deal with the coordination and control of the actual work within the work packages and tasks, whilst the administrative management role is directed towards maintaining the relationship with the Commission, performing proper reporting, and controlling resources and budgets.

Best practice 2: Facilitate collaboration in a diverse team

Without the right people collaborating in a spirit of trust, a project would achieve nothing. The challenge for a project manager is to facilitate this. In international collaborative projects, participants have different backgrounds of culture, language, and discipline. These differences need to be recognised and bridged as early as possible. Face-to-face meeting and regular audio-conferences are crucial in this. You need to create an atmosphere, where participants appreciate and trust each other. The project management team is key to facilitate this by setting a good example.

Best practice 3: Effective reporting with a proper tool

The reporting requirements of the Commission are complicated and detailed. Only good reporting tools allow keeping the effort for providing the required reports on a low level, while ensuring the reporting requirements are fully met. NM2 and TA2 have been successfully using a tailored online reporting tool called "EuresTools Reporter", developed by Eurescom. The reporting tool helps in creating all required reports and keeps the effort for the partners to provide their required inputs to a minimum. The reporting tool is also used for overseeing and controlling the project budget and the work performed.

Best practices in dissemination and exploitation

By Doug Williams, BT

Best practice 1: Reach out to the press

If you want to change what your peers think write a paper. If you want to change what the world thinks, talk to the press. And when you do, use a professional PR service, the most influential one to which you have access. If you don't deal with the press in a professional way, you are unlikely to achieve the high media coverage you are aiming for.

Best practice 2: Deliver a simple message and cope with distortions

Have a clear simple news story, but remember that journalists write what they hear and think – and not necessarily what you tell them. Expect backlash from your partners when what is reported is not always quite right. Accept that you are not in full control of the process, and deal with this calculated risk positively, as the rewards in public awareness usually outweigh the risk of unpleasant distortions of your message.

Best practice 3: Exploitation based on principles

Use an exploitation approach based on agreed principles. Principles should encourage execution of exploitation activities, like, for instance, licensing. The burden of attempting to exploit a licensing activity should be born in mind. Licensing is risky and expensive, so the activity should be rewarded through an appropriate share of any value being returned to those actively involved in the licensing. Consortium partners should always bear in mind that a small part of something is better than a bigger part of nothing.

Summary of the discussion at the networking session on 25 November 2008

The discussion following the presentations focused to a large extent on the daily management challenges that coordinators are facing.

Recognising a good coordinator

In this context, the question came up, how to recognise a good coordinator. This can be a crucial question for a project, as a bad coordinator can ruin a project, as the experiences provided in the discussion underlined. Thus, it is important to recognise, whether the coordinator is capable of doing the job before it is too late.

Doug Williams, BT, suggested that a good indicator on the capability of a coordinator is what management tools he uses and how he structures the work. The professional use of adequate management tools increases the probability that the coordination is done effectively.

Another important indicator is, whether there is a division of labour between a technical and an administrative manager. If the technical manager is also handling the administrative and financial tasks of project coordination, chances are he will be overloaded and not extremely effective. Thus, a division of labour between an administrative project coordinator and a technical manager makes it more likely that the coordination is handled effectively. In general, it is a sign of good coordination, if the right people get the responsibilities for work packages and tasks in which they have already proven their proficiency.

What to do when a researcher or a partner leaves

Several participants had experienced the problem that a researcher doing crucial work in the project became ill or changed job, which threatened the timely delivery of results.

Anastasius Gavras, Eurescom, pointed out the importance of an early-warning system for such events within the project. On the basis of a good, proactive communication culture that needs to be established by the coordinator from the start, the co-researchers closest to a researcher who is about to leave the project should warn the coordinator and the respective work-package leader as early as possible about this. Knowing early about personnel changes makes it easier to find a replacement.

Although the most obvious solution is a replacement within the same organisation, this rarely works, as other available researchers in the organisation are usually lacking some of the required expertise. So, the work may have to be distributed to other partners, which may require a budget re-allocation. In some cases a researcher, or even team of researchers, especially at a university, change to another university. Then, it is easier to change the partner in the project and sustain the expertise in the project, rather than trying to find the same expertise at the university he/she left.

An even more serious problem occurs, when not just a researcher, but a partner organisation leaves the project. There are basically two ways to solve this problem: either redistribute the work to the remaining partners, or find a new partner to replace to one who left.

Redistributing work among the remaining partners can be difficult, as there is the risk of losing coherence, if it is split up, said Mr Gavras.

The other option is substituting a partner. According to Peter Stollenmayer, Eurescom, it is not as difficult as it might look like to find new partners, even in the middle of the project, as there are usually organisations available that are interested to participate in European collaborative projects.



What to do if a partner underperforms

Some participants gave examples of consortium partners underperforming. It was discussed what to do in this case. Mr Stollenmayer said that it is very important, to evaluate first, if there really is a case of underperformance or bad performance. This needs to be based on objective indicators, like missed deadlines for deliverables or bad language quality of a report. Once an underperformance is objectively established, Mr Stollenmayer recommends to talk with partners individually and find reasons and solutions to the problem. If this doesn't help and the underperformance threatens the success of the project, the ultimate measure is to remove the partner from the project consortium.

However, before such a grave measure is taken, everything possible needs to be done to make a defaulting partner do their work correctly as contractually agreed. Doug Williams, BT, recommended to consider changing the budget according to underperformances, i.e. to move budget from an underperforming partner to another partner who is capable and willing. The performance of each partner should be reviewed once a year. Although this may require a change of the contract, Doug Williams still thinks it is worth it in order to ensure the success of the project.

The importance of dissemination and getting feedback

In the discussions, the question emerged how important it is to show and publish the results of a project. Doug Williams regards this as an important test of the validity and relevance of a project's results, as peers and potential users will provide valuable feedback that could highlight possible weaknesses in the technological solutions that are explored.

In this context, Peter Stollenmayer suggested to agree with the EC project officer on a first review at an early stage, i.e. before the end of the first project year; the feedback by reviewers would allow to still change important aspects, which may not be possible, if the project has further progressed.