

SHORT TERM SCIENTIFIC MISSION (STSM) – SCIENTIFIC REPORT

The STSM applicant submits this report for approval to the STSM coordinator

Action number: TN1302

STSM title: The voice of research administrators – building a network of administrative excellence (BESTPRAC)

STSM start and end date: 19/02/2019 to 23/02/2019

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SUMMARY

My STSM offered me a special opportunity to get insight to the work of a similar organization involved in a greater number of EU funded projects and to meet best practices from the first hand. As ISINNOVA is engaged in a wide range of research topics in the fields where HÉTFA Research Institute has also gained extensive experience (e.g. policy effectiveness, urban planning, responsible business practices, impact assessment, etc.), this visit served as a basis for cooperation between the two institutes, e.g. under Horizon 2020 and Horizon Europe. Being an early stage administrator, my STSM at ISINNOVA has also contributed to the development of my professional and operational skills.

PURPOSE OF THE STSM

HETFA Research Institute is an independent think tank engaged in economic and social research, policy support and analyses, urban and territorial development as well as entrepreneurship and competitiveness. As an international project assistant of the Division for International Cooperation, my duty is to find and seize opportunities at local, national and international level in order to strengthen the institute's capacity.

ISINNOVA and HETFA has much in common, both regarding their research topics and their functioning as research institutions. Therefore, the main goals of my STSM were the following:

- 1) Identifying and sharing good practices and possible pitfalls in project management with a special regard to Horizon 2020;
- 2) Get in-depth information on strategies and key success variables to promote the participation in international research projects in both, home and host institutions;
- 3) Sharing of best practices, management tools and internal processes between both institutions;
- 4) Explore possibilities of collaboration at different levels and identify common interests to work on together.

In summary, my aim during this STSM was to discover existing knowledge of a private research institute in the field of EU project development and management, identify potentially transferable practices, enable

knowledge sharing, reinforce networking and deepen our collaboration with the elaboration of joint projects with mutual benefits on the common fields.

DETAILED DESCRIPTION OF WORK CARRIED OUT DURING THE STSM

Meeting with Irina Rachieru – introduction to the international activities of ISINNOVA

For more than four decades ISINNOVA has participated both as a leader and a partner in over 100 European projects (mainly funded by the European Union's FP4, FP5, FP6, FP7 and Horizon 2020 programmes); therefore, it has substantial experience in the field of project development and management. ISINNOVA has a well-established and active network; its staff works with partners from different sectors and fields, i.e. European and national associations, local and regional authorities, public and private organisations, universities, research institutes, etc. I get insight to the ongoing and closed projects of ISINNOVA.

Meeting with Giovanna Giuffré – ISINNOVA's expertise in policy impact assessment

ISINNOVA has worked extensively in the field of policy impact assessment, particularly with regard to socio-economic impacts and the development and application of forward-looking analysis (FLA) methods and tools and has played an important role in the conception and implementation of some of the most significant projects carried out in Europe. With Giovanna we discussed the following questions:

- how to answer complex challenges in a systematic way,
- how to get policy making nearer to needs of citizens,
- how to ensure the cooperation & active participation of citizens in a project that affects them at a great extent,
- how to tackle the challenge of cooperating with different experts within the framework of a project,
- the importance of "wild cards" (i.e. low-probability, high-impact events) in foresight projects,
- how to identify the steps of the research,
- applying quantitative & qualitative modelling,
- how to measure social change.

Meeting with Danilo Zaini – the importance of excellent financial administration at a research institute

It was very useful for me to have a long conversation with Danilo as he has highlighted in detail the diversity, complexity & outstanding importance of administrative tasks at a research institute. As he graduated in Statistics and Economics and has been the financial administrator at ISINNOVA since 2011, he has profound expertise in the field. We discussed the management of finance-related aspects of the company, such as monitoring of costs, compliance to national & EU regulations, recording of working time & preparation of time sheets, archiving documents, contract preparation, applying financial check tools, using templates e.g. for preparing Partnership Agreements to determine clearly the responsibilities within the partnership, etc.

Meeting with Margaret Pesuit – practices used in communication and dissemination activities

Margaret is responsible for coordinating all communication & dissemination activities of ISINNOVA. Therefore, she is an expert of developing and applying communication strategies regarding EU-funded projects. We discussed the following issues:

- Dissemination and Exploitation Strategy (DES) in case of Horizon 2020 projects
- effective use of different communication tools like newsletters, videos & social media sites
- measuring the success of dissemination activities within a project
- the utility & usefulness of free Google tools (e.g. Google Analytics, Google Sheets)

Meeting with Riccardo Enei – ISINNOVA's expertise in transport

Riccardo is an expert in transport economic research & Trans-European Networks and has been involved in several projects in this field (mostly implemented under Horizon 2020). We discussed partner searching

possibilities, the methods regarding quality- and risk management, the advantages and possible pitfalls of individual way of work at a research institute as well as the importance of networking.

Meeting with Loriana Paolucci - ISINNOVA's expertise in energy & environment

Loriana has contributed to several European projects related to energy efficiency and renewable energy sources. Together we went through the steps of elaborating a Horizon 2020 proposal in details – starting with identifying the funding opportunities until submission. We have touched on the following questions as well:

- building an excellent consortium appropriate for delivering the project-related tasks & communicating with them properly;
- elaborating the main structure of the proposal & defining the division of work;
- methods of brainstorming with partners;
- defined Work Packages in Horizon 2020;
- handling risks and identifying possible mitigating actions;
- maintaining continuous communication with the appointed officers of the European Commission;
- adhering to deadlines;
- reporting;
- budget planning and financial monitoring;
- subcontracting;
- quality management.

DESCRIPTION OF THE MAIN RESULTS OBTAINED & OF THE BEST PRACTICES / TOOLS / SYSTEMS IDENTIFIED

ISINNOVA has special strategies, techniques, experiences and internal management systems in fundraising, proposal writing and then managing these projects. Being a career entrant project assistant at a research institute, I was open to learn all these, and I am convinced that it has fostered my professional advancement & will support my work to an important extent at HETFA in the future.

It was also interesting for me to compare the working practices at ISINNOVA with my experiences gained at my home institute. One of the main differences I have discovered regarding the two institutes is the profile of the staff. ISINNOVA relies on the expertise of a multidisciplinary team consisting exclusively of senior researchers having strong project management skills & profound experiences & global mind-set, being involved in international networks and being able to work with multiple projects at the same time.

To summarize, the main lessons learnt are the following:

- dedicate time to evolve a common language inside the partnership
- never underestimate the worst-case scenarios
- reach out society & identify the needs of different target groups
- set up an appropriate recording system in order to meet strict requirements of the European Commission
- have strategies and profiles to become a coordinator and to become a partner in Horizon 2020
- conclude Partnership Agreements in a bilateral basis determining responsibilities between the partner & the coordinator to avoid misunderstandings and blaming in the future & to ensure clear communication with regard to the roles
- the role of each partner has to be formulated in line with their scientific profile
- develop management tools and methods to ensure the effective coordination of the consortium, e.g. document storage, templates for time sheets and other materials, checklists, etc.
- when developing communication materials place strong emphasis on user experience i.e. texts should be quick to read & easy to understand but include all the important information at the same time
- prepare tailor made content

- use of smart tools for project management (e.g. Trello) in order to enable partners to follow activities & deadlines, and download all the important materials
- involve external certified institutes for providing quality assurance
- define a scientific field / expertise which makes the participation of the organization necessary in a consortium
- to ensure the innovative character of the project it is important to map previous projects, develop new ideas
- importance of involving umbrella organisations to ensure the outreach
- importance of continuous networking
- rely heavily on personal contacts
- read carefully the text of the call and link it with your proposal during elaboration
- understand evaluators' approach & try to follow their approach
- strictly adhere to deadlines
- communicate everything clearly & in due time
- in order to ensure the quality and risk management of a project use an editable Excel file specifying the possible risks that can be emerged and organise monthly conference calls to update it together with partners
- as a coordinator maintain continuous contact with the EC officer
- justify in detail all the needed amendments
- as a partner inform the coordinator on any changes in due time, as well as on any possible unforeseen deviation from the original plans

FUTURE COLLABORATIONS

My STSM hosted by ISINNOVA provided the opportunity to discuss potential opportunities to reinforce future collaboration. ISINNOVA is interested in getting involved in the Erasmus+ KA203 project HETFA plans to submit in March 2019. The main aim of the proposal is to develop a complex module for potential research managers and administrators (RMAs) at European universities in order to deepen participants' professional & practical skills as well as to enhance the visibility and recognition of the research management profession thereby contributing to high-quality scientific work.

HETFA is planning to be involved as partner in projects under Horizon 2020. As the two institutes has much in common regarding their research topics they are both committed to contact the other if an opportunity for joint work arises.