

*STSM report – Juan Manuel Abolafia Moya*  
*Home institution: Fundacio Clinic per a la Recerca Biomèdica (FCRB)*  
*Host institution: Technion Israel Institute of Technology (Technion)*

- **Summary (to be also used for reporting to the COST Office);**

During my visit at the Technion Israel Institute of Technology (Technion) I expected to meet with many of the numerous research management units available. Technion actually accumulates a vast knowledge and experience covering many areas of expertise, including for instance, pre-award, postaward, managerial staff, scientific profile staff etc. Additionally, Technion complemented very well my expertise and the profile of my institution (within the biomedical sector) since the technology development is the core activity of the host institution. In particular, I expected to share with them the strategies to promote the participation of the research community in international collaborative projects as well as the collaboration with the industry. Sharing of project management skills and internal processes and best practices was also very productive for both, home and host institutions. This sharing of knowledge and expertise has definitely set the grounds for future collaborations at different levels.

- **Purpose of the STSM;**

The following aims were included for my STSM and all of them were fulfilled:

- Sharing of project management skills
- Get in-depth information on strategies and key success variables to promote the participation in international research projects in both, home and host institutions
- Sharing of best practices and internal processes between both institutions
- Identify strategies to promote the collaboration with the industry
- Explore possibilities of collaboration at different levels and identify common interests to work on together

- **Detailed description of the work carried out during the STSM;**

During my STSM I met with 7 members of the research management staff. I also met around three times with my BESTPRAC member contact Ms. Rita Bruckstein, Director of the Research Authority at Technion, who was indeed very welcoming with me and with whom I had very interesting conversations.

During my visit at Technion I met with two team leaders in charge of financial management, two managerial staff (Ms. Rita Bruckstein and Mr. Benjamin Soffer –Director of the Technion Technology Transfer), a proposal preparation consultant, and three specialists on EU funding.

During my meetings I formulated a number of questions specifically targeted to each kind of profile. During each meeting our internal processes at the home institution were also commented and it always turned out that many more questions arose from both sides. Some of the questions that arose were:

- What is your role or job description?
- What mechanisms are in place in order to ensure the proper implementation of the Projects?
- What mechanisms, processes etc ensure the best practices at Admin level?
- How does the PI track the economic development of his/her project?
- How is the economic management performed by the admin staff?
- How do you deal with the communication among units and with PI?
- Do you assess the performance of the companies that work with you?
- How do you deal with the IPR exploitation?

- How does the technology transfer unit realize that a project proposal needs your input?
- How do you search for partners for pilot testing of new technologies?

During my STSM Ms. Rita Bruckstein invited me to attend the inauguration of the Technion Integrated Cancer Research Center which was a very interesting event.

The very last day I gave a talk in order to describe my profile, my institution and our internal processes. For such talk there were many members of different research management units (around 12 attendants). I considered the talk very useful in order to examine the possibilities of collaboration and exchange of experiences.

- **Contribution to the goals of the COST Targeted Network;**

The STSM allowed me to tackle issues usually discussed within BESTPRAC since during my STSM I interacted with many research management units, therefore, having access to a wide variety of skills and expertise.

Experience was gained, both by the home and host institutions, exchanging financial, legal and administrative experience, as well as sharing best practices and processes as described below.

The STSM also helped to promote the establishment of a network focused on improving research management according to the section below.

- **Description of the main results obtained**
  - **elaborate in detail on the results obtained**
  - **describe what you have learned during your visit**
  - **please take into consideration that the readers of the report shall also be able to learn from it;**

A number of best practices and internal processes were shared. They mainly dealt with how is configured the internal arrangement of the research management staff units and how they interact with the research community. I would highlight the following aspects:

- Learning about different roles and job descriptions among the research management units is indeed very productive.
- Timesheets filling in is indeed a challenge and for that the frequent interaction with the PIs is key. Having staff members involved in the control of timesheets is a good strategy. Frequent meetings with the PI are also a very important and at the same time a simple tool to ensure proper project development.
- Excel is also a major tool to ensure proper project management while SAP is considered for both home and host institutions very rigid and not adaptable to the EU projects.
- Having devoted scientific staff to support the researcher on key sections of the proposal and for strategic funding schemes seems to be also very useful.
- We also exchanged info regarding the consultant companies that were good and the ones that were not so good to work with.
- The depreciation policy was also discussed, together with the last change in the annotated grant agreement in which the concept of full capacity is not mentioned anymore. We also discussed that for instance in order to ensure the best value for money for the travel expenses we have previously selected a travel agency through a public tender.

- **It is mandatory to describe which of the best practices / tools / systems from**

**the host institution will be (tried to be) implemented by you within your institute. Please also describe the reason / benefit of its implementation. In this regard identify the 1) tools/systems/practices that are beneficial, and more importantly, describe their content (please obtain permission from your host to reproduce, if necessary)**

I plan to discuss with my superiors the ways to increase the interactions with the research community. For instance, having periodic meetings already set in advance will allow the project research manager to better track each project and prevent problems. For instance demanding the timesheets properly filled in monthly.

Having personnel with a scientific background working toward strategic funding mechanisms is also a very useful aspect which we will explore.

The preparation of the summary of H2020 procedures for each new project, having a Kick Off Meeting with the admin and PI's team and receiving PI's signature on a form during the internal kick off meeting is also an important aspect that we will pursue since so far we haven't requested the signature of such internal form.

A close track of the Principal Investigators (and their research project proposals) which collaborate usually with the industry is also key to identify patentable and commercialese ideas. Internal processes shall be disseminated among these principal investigators.

The specialization of the project management staff per funding scheme is also important to allow a better understanding and tracking of each funding scheme and, therefore, better support to the principal investigators.

Support to the principal investigators on the scientific reporting is also an aspect to improve from our side. For instance, what aspects to be included regarding the outreach activities.

Two other important roles to bear in mind were related with allocating ideas to calls and to coordinate the submission of amendments and reports.

- **Future collaboration with host institution (if applicable);**
  - Projects description will be exchanged among home and host institutions for the coordinated projects in order to maximize the chances of the research staff to obtain funding.
  - Courses and project management events will be shared.
  - Information related with NIH funding will be shared.
  - Identification of the staff members responsible for allocating ideas to calls is also very useful for future collaboration.
- **Foreseen publications/articles/dissemination tool or document resulting or to result from the STSM (if applicable);**

Each STSM report will be uploaded onto the Targeted Network website.

- **Confirmation by the host institution of the successful execution of the STSM (see Annex III);**

See attached signed letter.

- **Other comments (if any).**

I definitely believe that the Short-Term Scientific Missions are a very good instrument for the early stage researchers to learn about project management and to promote the exchange of knowledge.