



## **Group STSM Report**

**Title:** *“Exchange of practice of EU and other international funders: research support, financial and project management”*

27<sup>th</sup>-29<sup>th</sup> March 2017

**Host institution: Fundacio Clinic per a la Recerca Biomédica (FCRB)**  
**Barcelona, Spain**

**PhD Marija Gacic, financial project consultant**  
**BioIRC doo, Kragujevac, Serbia**

## Summary:

I took part in a group STSM to Fundacio Clinic per a la Recerca Biomédica (FCRB) Barcelona, Spain from 27<sup>th</sup>-29<sup>th</sup> March 2017.

During my stay in Barcelona , the STSM group was introduced to a variety of topics related to pre-award and post-award phase of research administration work. Topics that were presented and discussed were very useful for both sides, especially legal and financial management, technology transfer and the organization of research support services. What I found very interesting and useful was that my home institution is very similar to host institution regarding subject of research (biomedical field) so we had lot to learn, because our company is small and comes from Serbia, which is not yet a member of EU. It was inspirational to discuss and share information with skillful and experienced research support staff.

The main topics that we covered during our STSM were:

- strategies to promote the participation of the research community in European and international projects
- bestpractices related with: project finances, project management, compliance/legal
- strategies on how to promote the participation of the industry in collaborative projects
- dissemination strategies
- strategies to promote the participation of young and senior researchers in ERC calls

strategies to gain new partners for collaborative projects

Me and my STSM friends from Turkey and Portugal had a great opportunity to introduce our home institutions and exchange best practices, exchange experience about organization of research administration and support on our institutions, basics of consortium agreements and IPR, research support structure, internal hierarchy and organization, internal rules and procedures, technology transfer activities, some issues and problems that we all have in realization of projects.

## Purpose of the STSM

I have been working as a financial project officer and consultant for four years, and I have opportunity to learn a lot about project management, especially of the financial management and documentation preparing. Regarding the fact that getting funding from EU funds for research is very important for poor countries like Serbia and that Serbia has a great scientific potential, it is very important to have a well educated staff for financial and documents management.

Very often administration staff is not very well prepared for managing EU projects, because they are not willing to change their every-day routine, often don't speak English. This can be very dangerous for the institution, because even if the project is done well, lack of necessary documents can result in „off setting“ by European Commission.

Research manager must know very well all the financial and legal regulations of European Commission and adjust them to national laws. My home institution is a small company devoted to research, and extremely successful , but I think that we need administrative professional for managing all the research work, and let scientist do their job. Since Fundacio Clinic and BioIRC have similar research field, it was very important to me to learn „some secrets of project management“ from our hosts.

## Detailed description of the work carried out during the STSM

### Monday 27<sup>th</sup>

#### 9.00 -12.30

- Welcome by the Managing Director and campus tour
- Introduction of participants
- Institutional description and departments (Speaker: Juan Abolafia)
- talk on (Speakers: Elsy Gonçalves, Ozge Sahin, Marija Gacic):
  - strategies to promote the participation of the research community in European and international projects
  - bestpractices related with: project finances, project management, compliance/legal
  - strategies on how to promote the participation of the industry in collaborative projects
  - dissemination strategies
  - strategies to promote the participation of young and senior researchers in ERC calls
  - strategies to gain new partners for collaborative projects

#### 13.30- 17.00

- Scientific coordination:
  - meeting with the head and staff of the unit. Discussion of roles, internal processes and exchange of bestpractices
- European projects office (pre-award):
  - meeting with the head and staff of the unit.
  - discussion of roles, internal processes and exchange of bestpractices (e.g. third parties, clinical trials)

### Tuesday 28<sup>th</sup>

#### 9.00-12.30

- projects follow-up unit (postaward):
  - meeting with the head and staff of the unit.
  - discussion of roles, internal processes and exchange of bestpractices
- Institutional Actions Office:
  - meeting with the head and staff of the unit.
  - discussion of roles, internal processes and exchange of bestpractices

### **13.30-17.00**

- Knowledge technology transfer unit:

- meeting with the head and staff of the unit.
- discussion of roles, internal processes and exchange of bestpractices

- Farewell by the Strategy Officer (16.00 h)

### **Wednesday 29th**

### **9.00-13.00**

- Additional meetings on the basis of our additional needs

### **Contribution to the goals of the COST Targeted Network**

My job was mainly financial management in the post-award phase with very little implication in the pre-award phase, and mostly in the Tempus and Erasmus programme. This Group STSM gave me opportunity to learn more about pre-award phase and H2020 programme, while exchanging valuable information and practices with hosts and other participants. I can now say that I have learnt very important things about proposal writing, divide jobs between pre-award and post-award staff and heard many useful informations about some calls that we have not had a chance to participate. Discussions took place and best practices were shared concerning all phases of research project management. I wanted to know more about clinical trials, technology transfers and how to put research results to the market, like software, medical devices etc. My hosts gave me opportunity to collect lot of useful informations because they organized the meeting with head of Technology transfer office.

We agreed that IDIBAPS and BioIRC have good platform for future cooperation, because BioIRC is R&D centre devoted to the development of computational methods and software for various problems in engineering and bioengineering. I am looking forward participating some new projects together.

Main contributions to the goals of the COST Targeted Network were:

- I have built my professional network in research project management by meeting hosts and other participants
- We exchanged lot of experiences in our discussions about administrative, legal and financial issues that we all have
- I learnt about new tools for Project management and organization that I am going to apply at my institution
- We plan to have fruitful cooperation in the future, both on research field and Project management

## Description of the main results obtained & best practices

The STSM took place in Barcelona on March 27-29. The STSM started with a meeting at the FCRB and presentations of the host institution, their organization scheme, activities that they perform in project management. FCRB is responsible for managing IDIBAPS (August Pi I Sunyer Biomedical Research Institute). The mission of IDIBAPS is to combine high quality clinical research with high-level basic research in order to achieve a more effective transfer of scientific results in the prevention and treatment of the most common health issues in Spain. Founded in 1996, it is a public consortium whose members are the Catalan Government, the Hospital Clínic of Barcelona, the University of Barcelona's School of Medicine and the CSIC Biomedical Research Institute in Barcelona. It represents over 1.000 research professionals organized into around one hundred research groups. Its combination of basic and clinical research allows for a more effective transfer of the scientific advances obtained in the laboratory towards patients. With close to 1,100 articles published each year and an impact factor of over 6,000 points, it is Spain's principal biomedical research centre.

In the H2020 programme they had: 340 applications, 40 funded projects (4 of them as coordinators). It is Spanish institution with the most amount of Innovative Medicines Initiative (IMI) projects (6). Among the Spanish institutions obtaining most H2020 funding, participating in new instruments: Pre-Commercial Procurement, European Institute of Technology, Fast track to innovation etc.

Then three of us had a chance to present our home institutions: Sabanci University from Turkey, University of Porto - Faculty of Psychology and educational sciences from Portugal and BioIRC research and development center from Serbia. From these presentations we also learnt a lot and exchanged our best practices.

Learning about different roles and job descriptions among the research management units is indeed very useful. IDIBAPS has complex organization. They have pre-award office and post award office, and they have 3 departments: for EU projects, for national projects and for private investors. I was mainly interested in a technology transfer, how IDIBAPS brings to market their scientific results. We had a meeting with the head of the *Technology transfer office* so I learnt that they hire a company for that job or create a spin-off company. By getting royalties they provide additional funding for future research. I got useful contacts and tips for putting results to market that I am going to apply.

IDIBAPS has a *Scientific coordination office* and we had a meeting with the head of office. Their role is to create a scientific strategy, make selections for PhD candidates, make selections of the calls according to strategy, analyze publications and articles to be published etc.

We also had a meeting with the head of *Institutional actions office* and their role is:

1. To seek and obtain competitive funds either from local, national or European calls in order to promote strategic actions at the Institute and actions dealing with scientific policy
2. To ease and promote the smooth development of these actions
3. To encourage the research community to engage in the definition of European research policies

We also exchanged lots of experiences about financial audits that we had and lessons learnt are:

1. EC can always send auditor to check „How we spent their money“
2. We must be prepared for audit process, our documents must be complete, readable, according to the Programmer financial rules, so the best practice is to start collecting documents from the beginning of the project.
3. Time sheets are very important, so it is a recommendation that we have electronic control tool or a software developed for that purpose
4. For every cost we have to have complete documentation, according to the programme rules
5. Auditors can check everything so we must be very careful with financial management and take care of every detail of the Grant agreement and consortium agreement.

### **What I am going to apply?**

BioIRC is a small R&D company with 30 employees, but very successful in the field of biomedical engineering and with very good references so far. As a small institution we do not have a special department for project management, and financial activities were outsourced to the accounting company. But, as I said our administrative staff doesn't have experience in managing European projects, so there is a strong need to establish a new organization within the company.

That means that I will try to implement some tools that I have learnt about:

- Software for timesheets which will provide effective time- management and make sure that there is not an overlap between two or more projects.
- Make document management tools for easier managing of the projects and be ready for eventually financial audit.
- Provide researches with detailed information about financial rules and what they can expect.
- We agreed that there is a lot of space for future cooperation between our two institutions on the projects.

*Notice: I want to thank to our hosts for warm hospitality and to my STSM friends, Elsy and Ozge for valuable experience that we shared.*

***Marija Gacic***