

# Preparing and managing a European R&D project step by step

Step 1	Getting ready	Knowing the funding body: European Union, European policies, ...			
	Gathering information - Do your reading				
	<u>Key documents</u> : FP7 legal basis, White, Bleu and Green EU papers, glossaries, <b>FP7 legal basis</b>	Attending info days, meetings, etc.	<b>Web sites</b> : CORDIS, EUROPA, NCPs	Call for experts-evaluators	
Step 2	Knowing the Rules of Participation	Reading Rules of participation (published by the Official Journal of the EU)			
	Knowing the participation and implementation rules				
	Legal and guidance documents - Type of supported projects and funding schemes	Who can take part?	Implication of the participation	<u>Horizontal issues</u> : SMEs, Ethics, Gender Research integrity, etc.	
Step 3	Preparing to make a proposal	Reading Specific Programmes – Draft version of the Workprogrammes			
	From ideas to project				
	<u>Brainstorming and selecting ideas</u> : defining the research questions	<b>Consortium building</b> ; searching and contacting potential partners	Organising a <b>first meeting</b> with potential partners - <b>Identifying the coordinator</b>	Drafting the <b>structure of the project</b>	
Step 4	Understanding the evaluation procedure	(Re)Reading the Guidelines on proposal evaluation and selection procedures			
	Knowing the evaluation process and evaluation criteria				
	Eligibility check - <b>Evaluation process</b> and <b>criteria</b>	Importance of <b>remote evaluation</b>	<b>Panel evaluation</b> – Hearing	<b>Ranking</b> : short list; reserve liste; ...	
Step 5	Waiting for the Call for proposals	(Re)Reading the Texts of the calls (published by the Official Journal of the EU)			
	Anticipating and waiting for the call				
	<u>Launch of the call</u> : download <b>key documents</b> (call, call fiche, Workprogramme, <b>Guides</b> for participants, <b>legal and guidance documents</b> )	<b>Read carefully all the documents</b>	<b>Consortium building</b> – Attend Commission's info days; attend a <b>first meeting with all participants</b>	<b>Teaming agreements</b> – Preparing the Consortium Agreement - <b>Model CA</b>	
Step 6	Writing and submitting the Proposal	Writing for the evaluators			
	Writing and submitting the proposal				
	Organising a <b>second meeting</b> with partners - Breakdown of the Tasks, WorkPackages - <u>Help on-line</u> : Guide for proposers - <b>Writing labs</b>	Pre-proposal check (optional)	A project is also a "commercial document" Be concise, Use <b>GANTT charts</b> , tables (Re) <b>Read carefully</b> the whole proposal	<b>Ethics review</b> ; <b>Gender</b> review, etc. <b>EPSS</b> : Electronic submission	
Step 7	Preparing the Contracts	Preparing the The model contract and The Consortium Agreement			
	Contracts: GA & CA				
	<u>Preparing negotiation</u> – Negotiation	<u>Contractual obligations</u> : <b>GA</b> (Grant Agreement); <b>CA</b> (Consortium Agreement)	<b>IPR-Helpdesk web site</b> - Signature of <b>GA &amp; CA</b> (Management rules, <b>IPR</b> )	Start of the project. The <b>kick off meeting</b>	
Step 8	Managing the project – Reporting	Reporting guidance notes – Technical annexes of the contract			
	Technical and financial follow up				
	<b>Reporting</b> : deliverables, technical reports, financial reports	<b>Audits</b>	<b>Final meeting &amp; report</b>	<b>Post contract</b> follow up	