RESET

Redesigning Equality and Scientific Excellence Together

Project Information

Topic:	SwafS-09-2018-2019-2020 Supporting research organisations to implement gender equality plans

Funding Scheme:	EU H2020 - Coordination and Support Action

GA Number:	101006560

Start date:	01/01/2021

Duration in months:	48

Project Coordinator:	UNIVERSITE DE BORDEAUX

RESET aims to address the challenge of Gender Equality in Research Institutions in a diversity perspective, with the objective to design and implement a user-centered, impact-driven and inclusive vision of scientific excellence.

Consortium partners

Project management toolbox for a project such as RESET

Document Information

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Abbreviations

AB	Advisory Board
AGA	Annotated Model Grant Agreement
AUTH	Aristotle University of Thessaloniki
CA	Consortium Agreement
CSA	Coordination and Support Action
CFS	Certificate on the Financial Statements
DoA	Description of Action
DCP	Dissemination & Communication Plan
DMP	Data Management Plan
DPO	Data Protection Officer
EA	Ethics Advisor
EC	European Commission
ERA	European Research Area
GA	Grant Agreement
GDPR	General Data Protection Regulation
GE	Gender Equality
GEP	Gender Equality Plan
H2020	Horizon 2020
IP	Intellectual Property
KPI	Key Performance Indicator
PM	Project Management
RRI	Responsible Research & Innovation
RUB	Ruhr University Bochum
ScPo	Fondation Nationale des Sciences Politiques, Paris
UBx	University of Bordeaux

U.PORTO	University of Porto
UOULU	University of Oulu
UL	University of Łódź
WP	Work Package

Executive Summary

The current document presents a Project management toolbox for a project such as RESET – an output of the EU funded project "RESET – Redesigning Equality and Scientific Excellence Together" (GA number 101006560).

RESET is a Horizon 2020 Coordination and support action aiming to address the challenge of Gender Equality in Research Institutions in a diversity perspective, with the objective to design and implement a user-centred, impact-driven and inclusive vision of scientific excellence.

This toolbox aims to handover all the necessary elements to ensure qualitative management of RESET and other similar projects. It contains good practices, tools, resources and related documentation to support project managers in their everyday life.

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Introduction

The current document constitutes the collection of guidelines, recommendations, tools and instruments designed for and applied in the management of "RESET – Redesigning Equality and Scientific Excellence Together" project.

RESET is an EU-H2020 Coordination and support action, which aims to address the challenge of Gender Equality in Research Institutions in a diversity perspective, with the objective to design and implement a user-centred, impact-driven and inclusive vision of scientific excellence.

The aim of this toolbox is to handover all necessary elements to ensure qualitative management of RESET and future similar project, namely good practice, tools and related relevant documentation to support managers in their everyday tasks. The toolbox is developed within the WP9 that has for an objective to "Manage RESET and ensure the quality of its implementation". It encompasses all activities related to the management of the EU-funded project, ensuring scientific, administrative and financial compliance. It aims to help the consortium to collaborate in the best way possible and to train ourselves by pooling practices and feedback. A specific effort within this WP is made on the compliance of projects as RESET with data protection and ethical requirements. WP9 has to ensure that the project's results and contributions are disseminated following the open access regulations.

In this context, the present document is structured as follows:

- *Chapter 1 – Project Management outline* - This chapter provides an overview of the framework for projects' functioning under Horizon 2020.

- *Chapter 2 – RESET Project Management System* - In this chapter, we provide an overview on RESET scientific and operational framework, which influences different processes of project management; it also outlines structure and working mechanisms in RESET. The final part of this chapter is dedicated to the administrative and financial rules, regulations and processes that enable conformity with the funding requirements.

- *Chapter 3 – RESET project management processes and procedures* - It elaborates on different operational aspects of project's functioning, such as quality assurance, communication, monitoring of impact, data and ethics management.

- *Chapter 4 – Other aspects* - This chapter specifies particularities of RESET in terms of management, such as change management, team management, co-design and societal and environmental responsibility.

- *Chapter 5 – Conclusions* - It summarizes the content of this document.

- *Annexes:* They include templates, indicative and guiding materials to be used within RESET and by other projects.

1 Project management outline

In this section, we provide a brief overview of the objectives and resources that served for the development of the toolbox, as well as we outline some basic concepts and processes applicable to the EU funded projects.

1.1 What is Project Management toolbox about

The ambition behind the development of this toolbox is sharing of good practices and providing an opportunity to compare, analyse, get inspired and apply processes and practices that revealed themselves as efficient in RESET.

This project management toolbox is a practice-based tool, drawn upon the experience of "RESET – Redesigning Equality and Scientific Excellence Together" consortium. It intends to provide hands-on guidance for teams involved in the RESET project and serves as an example for management and coordination for other Horizon 2020 and Horizon Europe projects.

The elaboration of this toolbox pursues the following objectives:

- Quality assurance of the project and avoidance of mistakes and/or rejection
- Compliance with Horizon 2020 requirements (administrative and financial regulations) following the recommendations of the Annotated Model of the Grant Agreement[1]
- Identification of good practices and sharing of tools and experience that can be useful for other H2020 and Horizon Europe projects
- Follow-up of the scientific and institutional implementation of the project, its milestones and tasks.

The guidelines, procedures and tools outlined in this toolbox follow the principles and regulations provided in the project's Grant and Consortium Agreements (if conflict, the Grant Agreement takes precedence). It also takes into account the experience of:

- BestPRAC[2] and EARMA[3] communities of project managers
- Recommendations and guidelines from the representatives of the European Commission and auditors
- Internal guidance tools developed within and by the partner universities
- RESET internal best practices singled out during the project's lifetime.

To meet the goal of this toolbox, its structure integrates various tables, figures and templates. It also contains boxes with *"Good practices"* (practices that have been

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[1] H2020 Annotated Model of the Grant Agreement, available at
ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf
[2] bestprac.eu/home/
[3] earma.wildapricot.org/

proved to work well and produce good results), *"Tips*" (small pieces of advice) from RESET and *"Useful links and sources".*

This guide does not replace any legal documents or resources published by the European Commission.

1.2 Project management components

Project management is the application of knowledge, skills, tools and techniques to implement activities in order to meet the defined objectives. It is a specific professional approach that allows us to organize reality in a methodological and structural way.

Behind each project, there is always an idea or a need for some innovation. It has clearly defined objectives, duration, phases, constraints and risks.

Running of the project requires the following approaches:

- **organisational** – set up an organisation in a project mode with appropriate and adapted steering bodies
- **methodological** – deploy different phases of the project methodology and use specific and efficient tools for each phase
- **positioning** – develop project manager's management skills to mobilize the team and integrate various stakeholders of the project.

Project management also integrates notions of "*objectives*", "*workplan*", "*schedule*" and "*budget*". The effective project management system implies techniques of smooth adaptation of the work plan and schedule to the current needs and challenges of the project and continuous support and involvement of partners and stakeholders.

Projects integrate different players, among which the most important are project leader, project manager and a team. The *project leader* has a role to orient, arbitrate and validate the decisions related to the project. This person has to evaluate the progress and coherence of the proposed and implemented actions. The *team* makes suggestions, designs and carries out its tasks. The *project managers* have to pilot, coordinate and make reporting for different stakeholders. In addition to that, they supervise and/or carry out the next activities:

- define project scope and gather requirements
- identify activities and estimate time, elaborate the calendar
- identify and coordinate resources
- create and follow-up the project's budget
- identify and monitor deliverables and milestones, general project's plan and timelines
- identify appropriate metrics and indicators
- ensure quality
- serve as single point of contact for various stakeholders and report to them

- manage risks and change, alert on potential risks
- mobilize and lead the team
- organize and moderate meetings
- communicate with many audiences via multiple channels
- value achievements
- close the project.

Consequently, Project Management of the Horizon 2020 funded projects integrates coordination of all partners and includes the next interrelated elements:

- *Consortium management:* assures the overall coordination of scientific and operational activities attributed to the partners and efficient communication within the consortium. Clear management and coordination structure is a precondition for successful implementation.

- *Administrative and financial management & monitoring:* technical, legal and administrative processes within the project, implementation and monitoring of which enables efficient & effective use of funds, completion of tasks, achievement of goals and milestones; setting up of corrective actions; quality control and follow-up of the deadlines. It is closely related with time management and reporting.

- *Time management:* monitoring of the beginning and end of project's tasks in accordance with the calendar and follow-up of production of outputs in due time. All the project's activities have to be carefully planned at the stage of proposal.

- *Reporting, communication with the Funding Agency and liaison with other initiatives and projects:* enables financial and technical feedback on the distribution and usage of the allocated funds; evaluates relevance of outputs and measures impact of project's activities, as well as its capability to use the results of other projects for further innovation.

Useful sources and links	
How to successfully manage a Horizon 2020-funded project	https://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-to-research-pm_en.pdf
BESTPRAC H2020 Coordinator's Survival Kit	https://bestprac.eu/outputs/learning-materials/project-management/
EARMA Community of Research managers and Administrators	https://earma.org/about/

1.3 Relationships with other deliverables

This toolbox relies on, complements and should be read in conjunction with the following deliverables and internal documents:

- ➢ D8.1 RESET Dissemination and Communication Plan, including links to Zenodo collection, website and dedicated pages on each partner institution website (WP8) developed in September 2022 (v4.0).
- ➢ D9.2 RESET Co-design starter kit (WP9) developed in December 2021 (v1.0).
- ➢ D9.4 Project implementation logbook: mid-term edition (WP9) developed in December 2022 (V1.0).
- ➢ D9.5 Requirements for the protection of personal data (POPD) – Data Management Plan developed in May 2022 (v2.0).
- ➢ D10.1 RESET POPD – Requirement No. 1 and D10.2 H- Requirement No.2 developed in May 2021 (v1.0).
- ➢ RESET Consortium agreement, which provides rules and regulations for the partners' coordination and management of data and results.

2 RESET Project Management system

In this chapter, we provide a detailed presentation of the RESET regulation framework, including project's type, managerial system and processes, consortium structure and administrative and financial procedures that have to be followed.

2.1 RESET framework

The management of the RESET project follows the principles set out in the Grant Agreement – GA 101006560 concluded between the beneficiaries of the grant and the Research Executive Agency of the European Commission under the Horizon 2020 framework. This agreement contains all financial and administrative rules related to the project. It outlines the type of framework, duration of the action, its budget, as well as defines rights and obligations of the parties. It is complemented by an Annex I or Description of the Action (DoA), which in its turn is subdivided into Part A and part B. Part A contains the work plan tables, description of work packages (WPs), deliverables and milestones. Part B provides the objectives of the project in terms of excellence, impact, implementation, protection of data and ethics.

Within the consortium, all project partners, who are also beneficiaries of the Grant, should fulfil their tasks duly, timely and according to the distribution of work specified in Annex I or amended by the decisions of the Consortium. They have to assure timely delivery of all financial statements and reports to the Coordinator. Any significant changes to this agreement (i.e. beneficiaries quitting the project, request for prolongation or changes to the Annex 1 etc.) have to be reflected in the form of the

amendment. This procedure is followed up by the Project Officer on the side of the European Commission.

The other regulating document for the project is the Consortium Agreement - CA. It is an internal agreement that liaises partners and regulates their relations. It describes organisation and functioning procedures of the consortium, namely its governance, rights, internal procedures and responsibilities of parties. It allows participants to determine the detailed administrative, financial and management provisions necessary to execute their project, as well as regulate intellectual property rights.

> ✎ **TIP**
>
> The contents of both agreements have to be reviewed by the concerned departments or administrative services of the organisations-members of the consortium. As this procedure may include several "back and forth" exchanges among partners and/or their legal services, it is recommended to start preparing them as soon as possible after the project's selection. The Directorate-General for Research & Innovation of the EC produced a guidance on how to draw the H2020 and Horizon Europe consortium agreements (see 'Useful sources and links' at the end of this part).

Within the framework of the Horizon 2020, RESET is a coordination and support action[4]. This type of project consists of dissemination, awareness raising and communication, networking, policy dialogues and research related elements. It implies that actions, tasks and WPs of RESET integrate studies, strategic planning and activities targeted to produce cultural change in academic institutions, such as training, awareness-raising, co-design, innovative outreach activities and constant improvement of results. These features make the project to combine a classic "waterfall" model with iterative and incremental project management systems (Messager Rota & Tabaka, 2009).

Specifically, the project is designed with several WPs that follow "step-by-step" or waterfall approach (Figure 1) and those that have tasks running during its entire lifespan (more incremental or iterative – Figure 2).

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[4] Actions consisting primarily of accompanying measures such as standardisation, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogues and mutual learning exercises and studies, including design studies for new infrastructure and may also include complementary activities of strategic planning, networking and coordination between programmes in different countries (HORIZON 2020 – WORK PROGRAMME 2018-2020 General Annexes)
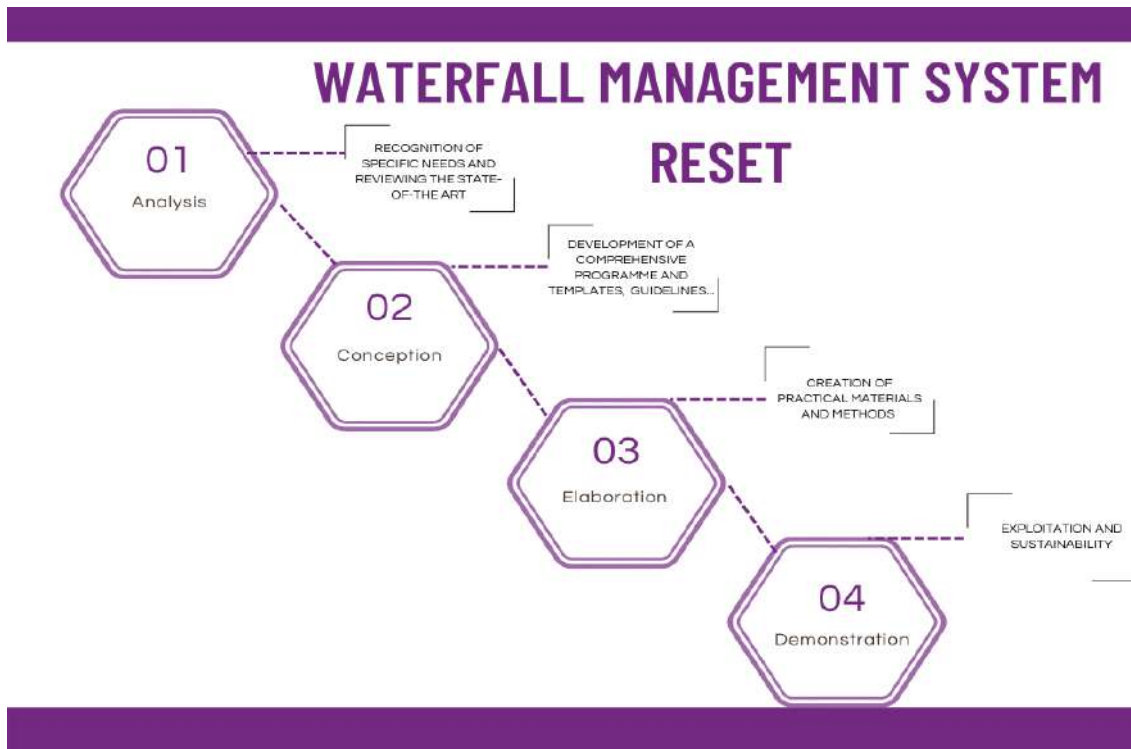
Figure 1. Example of waterfall management system in one of RESET work packages

In the latter case, the tasks of WPs have to include several levels or "additions" of development including adjustments and back and forth movements if necessary. The elaboration of RESET tools and toolkits often requires a direct feedback from partners and potential users to evaluate its "fit" to the expectations and context, as well as their continuous improvement. This methodology is also in line with the principles of co-design (Bjerknes and Bratteteig 1995; Greenbaum and Kyng 1991; Greenbaum and Loi 2012; Luck 2018; Schuler and Namioka 1993 as cited in RESET Co-design starter kit, 2021). It includes:

- Active, effective, meaningful stakeholders participation
- Mutual reciprocal learning, valuing each other's' expertise
- Iterative, collaborative design, collaborative creativity
- Equalizing power relations, striving towards democratic practices, giving a voice and a say to those who might otherwise be marginalized
- Contextual, situational, cultural sensitivity.
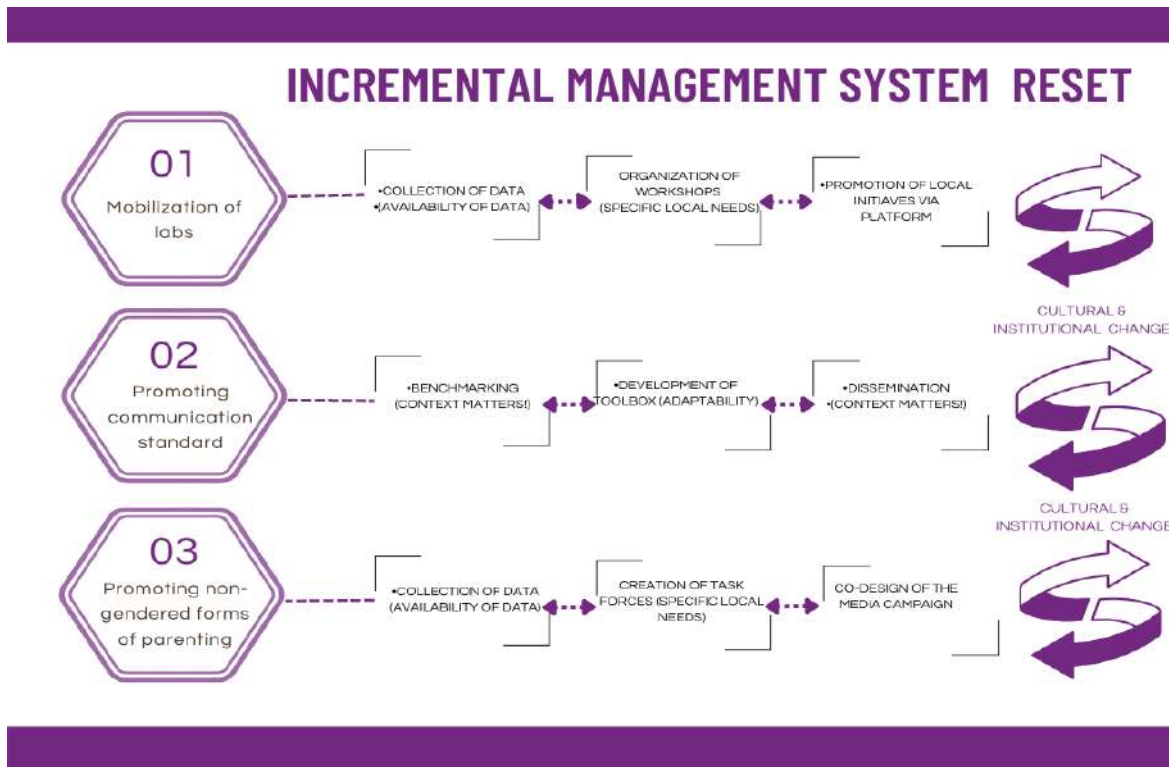
Figure 2. Example of incremental management in one of RESET WPs

The figure 2 above depicts several tasks in the RESET project and their phases. In contrast to the waterfall model, the phases in the incremental/iterative type of development can be reverse i.e. require additional work (supplementary collection of data, benchmarking, adaptability of procedures and risks' mitigation). It may also imply a subsequent "reverse" movement to the previous stage and further adaptation of the methodology. As the final goal of these tasks is the sustainable and cultural change (objective of the WP), the process can have a multiple number of iterations.

Another particularity of the RESET project is the management of stakeholders, as it implies not only management of the teams and target audience, but also implication of facilitators or decision-makers at the institutional level.

Good practice

➤ Include stakeholders at the pre-award/proposal stage, it will help teams to "think outside the box" - better foresee implications, innovations and risks.
➤ At the post-award phase they can be included to the external Advisory Board or invited to participate in some brainstorming and co-design activities.
➤ Incorporate diverse voices (representatives of minorities or under-represented groups) for your project activities.

In such case, mapping of external stakeholders allows to assess project's potential, but also to identify (see Figure 3):

- active players (convinced by the project's benefits), on whom we can rely
- those, who still have to be convinced that the project brings benefits
- those who have doubts concerning the validity of the project or even those who have a competing project.

Figure 3. RESET management of external stakeholders (source – RESET DCP 4.0, 2022)

Depending on the type of the target audience, the project manager (at the level of the project and locally) will have to adapt strategies (see Table 4 in the Annex 1).

Useful sources and links	
Grant Management	https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management_en.htm
Network of national contact points for Horizon 2020 and Horizon Europe	https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/ncp;sortQuery=country;countryGroups=MS,AC,PAC,3C;countries=;functions=7
H2020 Annotated Model of the Grant Agreement	https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

EU Funding Programmes 2021-2027 Annotated Model Grant Agreement	https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf
DESCA Consortium Agreement Model (commented version)	http://www.desca-agreement.eu/

2.2 Internal communication

The internal communication helps to keep all partners actively engaged in the project. It has to be clear and efficient and consists primarily of establishing mailing and contact lists and a project workspace (depository, intranet – e.g. a secure SharePoint or NextCloud space) to share files, calendars and facilitate collaborative work. The EU project managers set conference calls (Zoom, Ms Teams, Skype or any other software) and local, international meetings related to the project. The system of internal communication may include regular e-mail updates (weekly, monthly or ad-hoc urgent e-mails).

Work on international projects requires the possibility to have remote access to the working materials and results. RESET chose NextCloud space (Figure 4) as a common workspace for more efficient communication, lower environmental impact and secure data transfers.
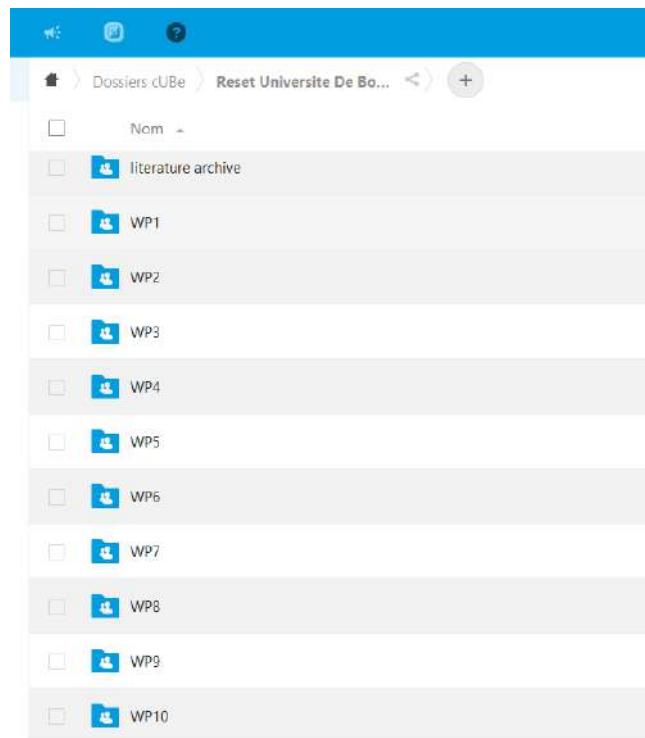
Figure 4. RESET NextCloud space

2.3 Consortium structure

Effective consortium collaboration relies on efficient communication and clear governance structures. It entails that the framework of the project is properly appropriated by the contributors, as well as actions, responsibilities and the associated workload are distributed among the actors.

To be conformant to that, the structure of the RESET Consortium had been decided at the stage of the project proposal and is reflected in the following scheme (Figure 5).
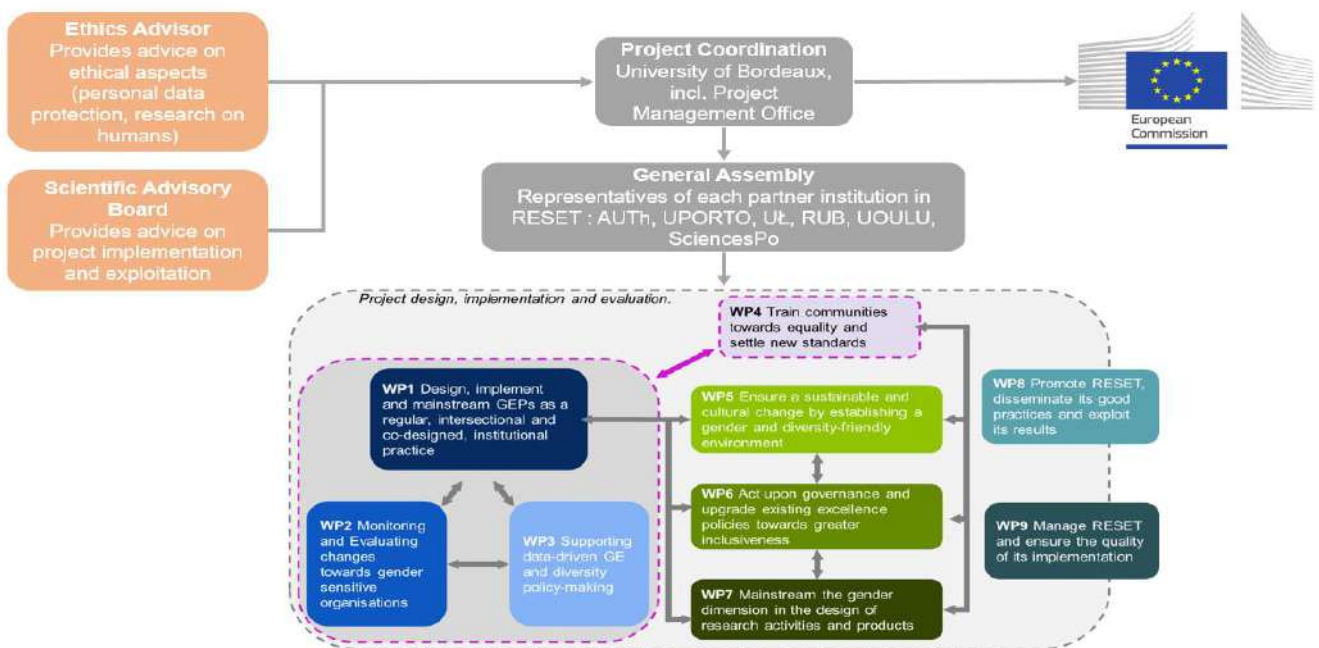
Figure 5. RESET Consortium structure

RESET project structure relies on the coordination systems that makes interface between the external bodies:

- General Assembly consisting of partner universities
- Funding agency - the European Commission
- Advisory bodies – Scientific Advisory Board and the Ethics Advisor.

The internal project functioning is supported by WPs that are broken down by blocks:

- directly related to GEP design, implementation, monitoring and evaluation
- contribute to the institutional change via actions targeted at cultural and behavioural change

- preoccupy with general project functioning and viability through management and communication.

Besides the consortium structure and WP functioning, each of the partners has "RESET-specific" assigned roles and responsibilities (Figure 6), which favour mutual learning. These roles and responsibilities are: GEP implementing partners (AUTh, UBx, UL and U.PORTO), mentors (RUB and UOULU) and evaluation and monitoring partner (ScPo).
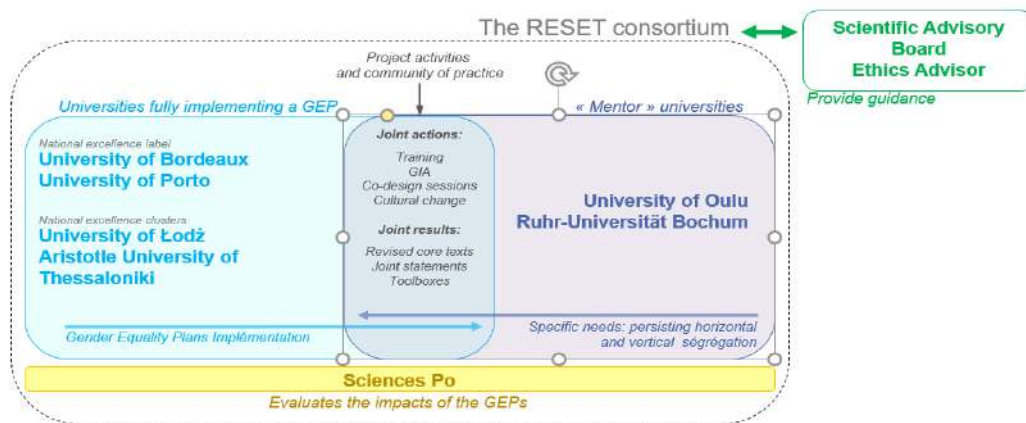
Figure 6. RESET roles and activities

2.3.1 Role of coordinator

Besides being the intermediary between the European Commission and the consortium, the *coordinator* partner has to ensure the communication and sound coordination between WP leaders, Task Leaders, and external Advisory Bodies. It performs all the tasks assigned to it in the GA and the CA. Another primary obligation is to monitor the progress of the project (according to the calendar) and compliance of the partners with their obligations. To fulfil this mission the coordinator:

- Collects, reviews and submits information on the advancement of the project, reports and other deliverables to the EC, administers the payments from the EC and executes other financial tasks
- Plans and chairs the Consortium and WP leaders meeting, monitors decisions, offers solutions and looks for consensus
- Provides support and guidance when any of partners encounters some specific issues or risks, evaluates them and informs other bodies if needed; encourages, motivates and gives example to partners
- Is entitled to anticipate the deadlines in achievement of the deliverables and milestones, and follows and contributes to the continuous improvement of the project.

Scientific coordinator is a person within the coordination institution, who is responsible for the scientific management and supervision of the timely and cost-efficient production of highly qualitative project deliverables, the exploitation and dissemination of project's results.

Useful sources and links	
BESTPRAC H2020 Coordinator's Survival Kit	https://bestprac.eu/fileadmin/mediapool-bestprac/documents/Outputs/Learning_materials/Financial_Matters/1_Main_documents/2019-09-05_H2020_Coordinators-Survival-KIt.pdf
Horizon Europe Coordinators' Day: Grant Agreement Preparation (26 January 2022)	https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event220126.htm
Roles and access rights – Funding and Tender Portal	https://ec.europa.eu/research/participants/docs/h2020-funding-guide/user-account-and-roles/roles-and-access-rights_en.htm

2.3.2 Roles of Work Package leaders

Project's objectives and initiatives are usually broken down into work packages and corresponding tasks. *WP leaders* assure the management of these WPs. They are in charge of technical progress of their respective WP, responsible for the coordination and supervision of tasks (along with Tasks' leaders) and reporting to the coordinator. They are entitled to:

- Plan and organize WP functioning and meetings (monitoring of timelines, collecting feedback and anticipation of risks)
- Supervise tasks, activities, milestones as well as the related deliverables
- Prepare timelines and take decisions for the WP tasks (in agreement with the Task Leaders) submitted for the further approval by the coordinator and the General Assembly
- Organise communication within the respective WP and with other WP Leaders
- Report progress and notify deviations at the WP leaders' meeting – presenting the WP progress in terms of completion (percentage and estimated time), deviations, corrective actions, results and deliverables.

In RESET, there are also Local Managers, who are responsible for the local implementation and monitoring of all WPs and tasks that concern the partner. Local and WP managers assist the coordinator in the process of the financial management and reporting.

2.3.3 Task leaders

At the scale of the WP, the *Task Leaders are* responsible for the timely implementation of the activities of the task and reporting to the WP Leader (decisions have to be taken in agreement).

Task Leaders can also be responsible for deliverables - their quality and timely submission for the quality assurance procedure (Annex 9) and to the European Commission. If not, they coordinate the work on the deliverable with the *Deliverable Leader* and report on it to the WP Leader and the Coordinator.

2.3.4 Decision Making and Conflict resolution

The General Assembly is the decision-making body of the RESET project. It is chaired by the project scientific coordinator and responsible for the monitoring of the execution of the project, making strategic decisions and defining RESET's exploitation. All partners are represented by one person and meet on a bi-annual basis.

The quorum is reached when at least 2/3 of the members of the General Assembly decide validly. If the consensus is not reached on two meetings in a raw, the chairperson should convene an extraordinary meeting.

2.3.5 Advisory Board

Projects establish external scientific/review panel (e.g. senior independent experts) to monitor the quality of project deliverables and internal materials of the project. In RESET, they are entitled to review project's progress and advice on potential orientations for its development. They follow the calendar of the Consortium meetings and meet at least once per year to submit an annual report on the progress.

The members of the external bodies carry out their missions upon the signature of the individual nomination letters by the President / Rector of the coordinator. The candidates for the membership in this board have to be selected and agreed on by the majority of the members of the project's consortium. In practical terms, the invitation and participation of these members in the project's sessions has to be prepared much in advance.

2.3.6 Ethics Advisor

In the EU project, the nomination of the Ethics Advisor – EA can be caused by the nature of the project: e.g. involvement of humans, clinical studies or studies with embryos or human cells.

In case of RESET, it mainly corresponds to the collection of personal data and potential involvement of vulnerable individuals – procedures required to validate the results and

tailor the main outputs of the project – Gender Equality Plans - to the needs of local communities (for example, in terms of gender or age relevance). It implies that a person selected for this mission has to present a considerable variety of experiences – including Ethics, Philosophy, Social Sciences, Data regulation, Law, Gender and be aware of the diversity of the European local contexts. Consequently, the mission of RESET Ethics Advisor stipulates consultations on the usage of personal data (GDPR), selection of participants, scientific excellence and gender questions, anonymity and integrity of the research.

The mission of the Ethics Advisor is described and validated in the separate nomination letter prepared by the Coordinator. Depending on the nature of the question, the Coordinator can run separate bilateral consultations with the Ethics Advisor and forward its results to the partners or to invite this expert to participate in some particular sessions (such as Consortium meetings, capacity building sessions or some specific consultations including other partners).

2.4 RESET Project meetings

Project meeting is one of the main activities that allows successful development of the international project. It enables partners to present, discuss and validate results of the local and general processes and procedures.

RESET project involves several types of meetings:

- *Internal* – project level: Consortium, WP leaders, Work Package meetings, Task meetings or any extraordinary/ad-hoc meetings involving partners that work directly on the project.
- *Local* – institution level: with stakeholders (e.g. GEP design), related to the communication and project's outreach activities (e.g. organisation of the participation in a conference), meetings of Gender Equality Boards.
- *Hybrid* – project & institutions: capacity building sessions, which can either be restricted or open to the audience external to the Consortium (e.g. institutional stakeholders not belonging to the project team, but interested in the subject).
- *Consultative* – with other projects/stakeholders: with the external advisory bodies, representative of the EC, representatives of other projects (e.g. sister projects[5]).

In order to follow the rhythm of all these meetings, the Coordinator has to set a calendar and prepare the Consortium and WP leaders' sessions (Annex 3). The coordination

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[5] According to the Gender Equality Unit of DG Research and Innovation, by May 2021, over 30 "sister projects" had already been funded, involving over 200 universities, research performing and research funding organisations.

team is also responsible for the preparation of agendas, minutes and the to-do lists (Annex 4).

The right system and rhythm of the meetings allows partners and other stakeholders to:

- be informed on what has taken place in the project/WP/task since the moment of the last meeting
- set the record straight of upcoming actions, events, risks etc.
- make necessary decisions
- keep various stakeholders engaged in the project.

✏️ **TIP**

Before planning any project event, consider providing and consulting an internal calendar tool that will integrate periods of institutional/organisational holidays, bank holidays and individual absence (see Template in Annex 2).

Good practice

To put down in writing:
➢ What? Agenda/minutes for each meeting, each point of progress; a summary e-mail of the decisions taken in the meeting; to-do lists, a risk analysis in case of identified or anticipated difficulties (see template in Annex 4).
➢ Why? To engage participants and stakeholders, secure the project, provide a sufficient level of information for decision-making and reporting.

A special place in the project is dedicated to the *Kick-Off* and *Consortium meetings.* These meetings are usually organized within the first 3 months of the project and reunite all partners (can also integrate members of the external Advisory Board, top representatives of the institutions and representatives of the EC - e.g. virtually). It provides an occasion to remind scientific objectives of the project, present administrative and financial rules, as well as obligations in terms of communication, open science and management of intellectual property. The Kick-Off meeting can also be launched internally – with research support and other relevant services.

Good practice

➢ Agree on the location and date in advance (e.g. every 6 months for the consortium meeting).
➢ Elaborate and agree on agenda and time of the sessions (consider time zone differences).
➢ Consider the location and accessibility of the venue.
➢ Validate the number of people in presence and online participation (if relevant) Consider sending reminders for the event (time, location and the links).

- ➢ Introduce interactive warm-up, brainstorming and co-design sessions or quizzes – favourable for team cohesion, communication and creative thinking.
- ➢ All participants have to fill in and sign the attendance sheet.
- ➢ Use the same template (virtual identity guide) for the presentations. Consider preparing a template with requirements for WP presentations in terms of content.
- ➢ Organisation: follow the « best value for money » principle: and no conflict of interests rule (get at least 3 offers).
- ➢ Take pictures (they can be used for communication on the project – newsletter, press release or as an evidence of attendance).

2.5 Administrative and financial management of the project

2.5.1. Rules and regulation

In terms of administrative and financial management, the EU funded projects have to follow rules and regulations set in the GA.

The details of the requirements applicable to the project of RESET type is set in the Grant and Consortium agreements. Following these requirements and conditions for the eligibility of costs is important for the sound financial management and quality of the project (Table 1). The coordinator has to prepare and share the templates and other materials that can be necessary and useful for reporting and other administrative procedures (Annex 6).

Conditions for eligibility of costs
• Keep the records and documentation supporting the costs declared, e.g. contracts, subcontracts, invoices and accounting records; number of units declared for the period of five years after the payment of the balance.
• Keep the records and documentation according to the usual cost accounting practices and internal control procedures.
• Keep records for the different cost categories:
• direct personnel costs (time sheets, declarations)
• subcontracting
• other direct costs (other goods and services, travel costs, attending conferences and/or workshops, invoices, CFS of audit or certificates on the methodology, publications)
• equipment costs
• Follow internal rules, practices and policy.
• Follow "Best value for money" principle: three offers, tender, market survey etc. or if applicable, the lowest price.

- Provide direct link to the action, incurred during the action (e.g. mission orders, relevant internal documents).
- Avoid any conflict of interests.

Table 1. Conditions for eligibility of costs

Useful sources and links	
Webinar session: Avoiding errors in declaring personnel costs in Horizon 2020 grants (27 September 2022)	https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event220927.htm
Horizon 2020 Annotated Grant Agreement	https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

2.5.2 Monitoring, management and reporting

Project monitoring is an essential step of decision-making process, as it helps to anticipate risks and pitfalls. It consists of continuous collection and analysis of project related information and operational environment (BESTPRAC, 2019). Within the framework of H2020, the beneficiaries have to monitor and report on their progress in accordance with reporting periods (Figure 7).

Financial monitoring is the critical moment in the implementation of the research and innovation action requiring the employment of significant budgets. It allows comparing actual costs to the planned ones and has to be based on the proper records and evidence, as its main purpose is to identify mistakes as soon as possible (BESTPRAC, 2019). The coordinator shall intervene should any deviations be detected.

The financial monitoring within RESET is carried every 6 months, and partners' financial offices and research support services shall prevent inconsistencies. Project's internal reporting stipulates that partners will report on the current activities and expenditures, so that it will facilitate the reporting to the Agency (Annex 5).

Continuous reporting consists in monitoring deadlines for the submission of deliverables and achievement of milestones on the H2020 Portal and the corresponding uploading of deliverables in due date (Annex 7).

What concerns the EC reporting, the GA contains indication on the division of project's timeline into the reporting periods (from 12 to 18 months).
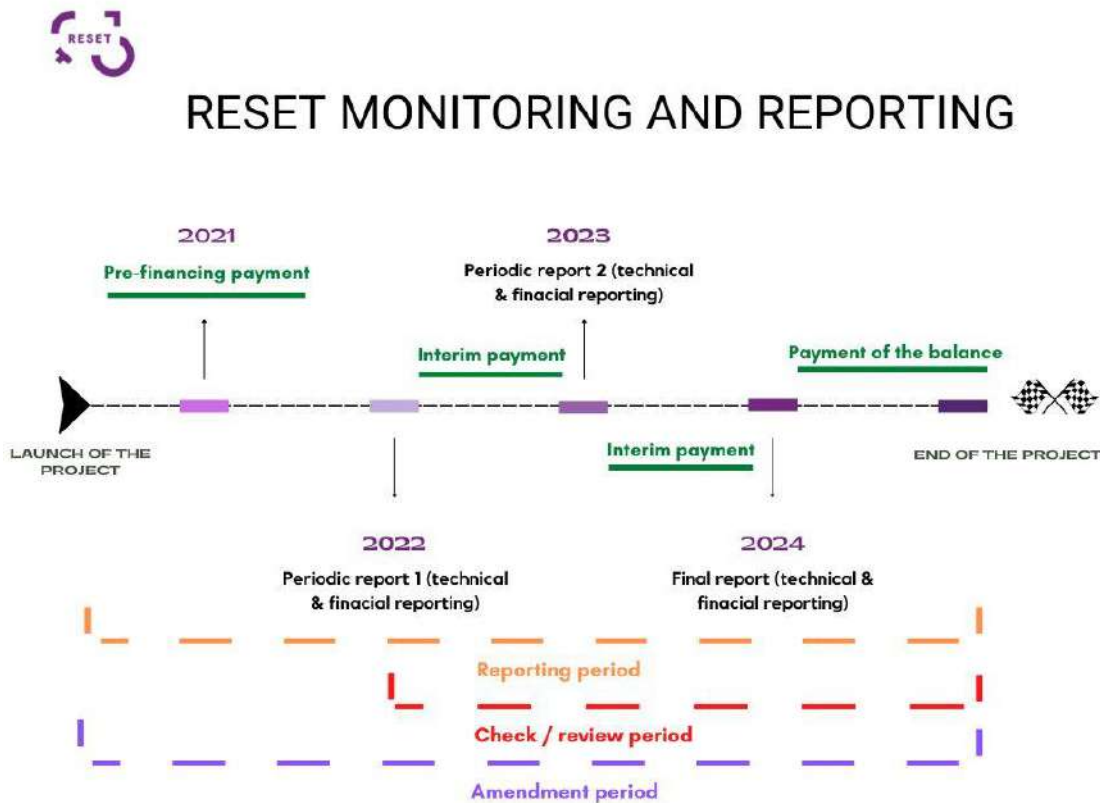
Figure 7. RESET monitoring and reporting timeline

The funding within the framework programme starts with the pre-financing payment, which is received and distributed by the coordinator after the signature of the GA. 5% of this payment are retained for the Guarantee Fund (established as an insurance contract in case of financial losses). This payment remains the property of the EU until the payment of balance.

The coordinator will transfer the interim payments from the EC to the partners after the successful completion of each reporting period. For EC reports, the coordinator has 60 days to submit the compiled report and the EC has 90 days to approve this report. These payments reimburse the eligible costs incurred during the periods[6].

The *Project Review* meetings have to be organized in accordance with the planning of periodic reporting and the format has to be agreed with the Project Officer and an external expert (Annex 5).

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[6] The total amount of pre-financing and interim payment may not exceed 90% of the maximum grant amount.

The *financial report* shall include all eligible costs incurred during the reference period. Financial part consists of the submission of individual financial statements by all beneficiaries (the model of this statement is included in the Annex 4 of the GA), and explanations of the use of resources.

The *technical part* is developed by the scientific coordinator and the project manager relying on the inputs of the WP and task leaders. It consists of two sub-parts:

- Online part completed through the platform for H2020 projects.
- Completion of a template with detailed description of work and justification of deviations from the description of Annex A (both financial and operational).

The final stage of the project concerns the *final report* and *payment of the balance.* Upon approval of the final report, the payment of the balance can reimburse the remaining amount of eligible costs.

The final report consists of technical and financial parts. The technical part draws an overview of results, their exploitation and dissemination, conclusions on the actions and its socio-economic impact. The financial report includes a final summary financial statement (all individual statements consolidated, the request for the payment of balance) and a certificate on the financial statement (CFS).

Useful sources and links	
Reporting and payment in practice (April, 2018)	https://ec.europa.eu/research/participants/data/ref/h2020/other/events/2018-04-12/6_reporting-payments-practice_en.pdf

2.5.3 Budget transfer and re-allocation

During the implementation of the project, there may arise a need in *budget transfers* or *reallocations* (within the Consortium budget or within partner's own budget). Transfers between beneficiaries and between categories do not necessarily require an amendment to the GA. The main principle is that the project is implemented as described in Annex 1 of the GA. However, budget adjustments have to be approved by

the Consortium and by the Agency and justified with reference to the needs related to the implementation of the project.

Before proceeding to the GA amendment (informing the EC), the General Assembly (governing body) must take a formal decision to make a significant reallocation. This decision must correspond to the provisions and procedures set in the CA (BESTPRAC, 2019).

In case the project implementation requires a transfer of tasks and, consequently, person-months between beneficiaries, it will lead to the amendment (change in Annex 1 of the GA).

2.5.4 Audits

During the implementation of action, the EC foresees different types of controlling mechanisms to check that the project is properly implemented, namely (BESTPRAC, 2019):

- *Checks (concern any aspect of the project, inspect the implementation, verify the compliance with legal obligations, address deliverables and reports; may be carried during the project and upon its completion).*
- *Reviews (technical, scientific, ethical aspects, though can include financial and budgetary aspects; may be run as on-the-spot visits and review meetings with further reports; can be carried out up to 2 years after the payment of balance).*
- *Audit (mainly concern financial aspects; followed by an audit report and may be initiated up to 2 years after the final payment; includes on-the-spot reviews and desk reviews).*
- *Investigations (to discover fraud, corruption or illegal activities at any moment of the implementation).*
- *Special case (on-the-spot reviews and desk reviews by the European Court of Auditors).*

Consequently, the EC may intervene at any moment of the project implementation and up to 2 years after its end with a direct (the EC own staff) or indirect (external persons or bodies appointed by the EC) audit. Any costs that are found ineligible will be recovered or deducted from the next payment.

The certificate on financial statement - CFS is compulsory for a beneficiary when it requests a total EC contribution of 325 000 € or more. It is a factual report prepared by an independent auditor, who checks the eligibility of the costs (mainly cost documentation methods) declared in the financial statement (BESTPRAC, 2019). This certificate has to be sent to the EC along with the final report. The beneficiary may select the auditor according to its usual accounting practices.

If the auditor discovers systematic errors, the findings may be extended to non-audited Grant Agreements or unaudited periods at the level of the institution. This means that the audit can be extended to other beneficiary's projects funded by the EC.

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Good practice

➢ Introduce or follow an internal system (e.g. intranet, depository, project management tool etc.) that will allow to keep on file copies of all administrative and financial documents and policies related to the project.
➢ Introduce or adapt a managerial system for tracking of resources (see Annex 6).

</div>

Useful sources and links	
Webinar addressed to providers of Certificates on Financial Statements in Horizon 2020 grants	https://ec.europa.eu/research/participants/docs/h2020-funding-guide/other/event210316.htm
H2020 Indicative Audit Programme	https://ec.europa.eu/research/participants/data/ref/h2020/other/gm/audit/h2020-iap_en.pdf

3 RESET Project management processes and procedures

This chapter outlines processes and procedures that take place within the RESET project. It provides an overview of quality assurance, evaluation and risk management measures, presents RESET strategies for communication, dissemination and exploitation and gives an insight into the project's procedure for monitoring of the impact. In the end, it summarises the data and ethics principles applied in the project.

3.1 RESET quality assurance, evaluation and risk management

As it has been mentioned in part 3.1, RESET combines elements of "waterfall" and iterative project management systems. That is why the assessment of quality is being carried not only when the output is ready, but also all along the process of implementation. In this way, partners are able to anticipate the results in advance. RESET also measures the conformity of each deliverable or any other output to the initial plan and analyses the gaps during the quality review procedure. In addition to that, several deliverables have their updates as the project evolves.

Among the principles that define the success of the RESET project, one can single out:

- *Mutual learning* to constantly improve results and share experience and best practices.
- *Strict follow-up of timelines* – calendars of the project (Gantt type – Annex 8) allow to have an overview of all planned activities, determine the limits and deadlines and visualise the progress. Setting of realistic time-bound and

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achievable project targets supports the identification, updating and mitigation of risks.

- *Administrative and financial guidance* from the coordinator.
- *Efficient communication channels* (*e-mails, collaborative platforms or video-conference tools*). The internal depository/workspace is used for internal communication, sharing of working documents and plans, minutes, status reports and administrative documents.
- *Capacity building and internal training activities* − strategic knowledge exchange within RESET is crucial to foster transparency and ensure that all partners have general knowledge of different aspects.
- *Building on the existing results, deliverables and experience* (*e.g. fine-tuning of the GEPs*).
- *Regular progress monitoring and evaluation carried out at several levels* − by the project evaluator partner (ScPo) - providing a critical perspective of both project's functioning and GEP implementation, the coordinator (UBx) and separately by each partner. Evaluation is present at all stages of project making. The coordinator includes SWOT analysis into each internal reporting meeting.
- *Collaborative quality review* − the quality review responsibilities are assigned among the partners taking into account their workload during the period.

Another important element of the quality assurance is evaluation of the means and resources to carry out the tasks and activities. In this case, the Project/WP/Task manager has to evaluate the available budget and check the eligibility of costs (Annex 6).

In terms of *risk management*, the Project Manager and teams have to keep in mind the constraints that have to be respected in a project (time, eligibility of costs, reporting, due delivery of results, communication etc.). Consequently, they can decide which constraints are more flexible and what would be the potential risks.

TIP

To assure more efficient and qualitative time management of the tasks and/or deliverables, the WP/Task/deliverables leaders may answer the following questions:

➤ What are the time limits of the task/action?
➤ What are the milestones of the task?
➤ What are the reasons explaining these milestones?
➤ What are the calendar constraints?
➤ Do we have any room for manoeuvre/flexibility margin?

Within the EU project management, it is the role of the project coordinator to ensure that the deliverable is ready in time to follow this quality procedure before being

submitted in the participant portal. The quality assurance applied by RESET is set in the Annex 9.

In addition to that, RESET QR review procedure for deliverables considers questions of the following checklist (Table 2).

Questions	Yes	No
1. The deliverable format follows the RESET visual identity format suggested in the Dissemination and Communication Plan (RESET, 2022).		
2. The type and the dissemination level of the deliverable are correctly indicated.		
3. The versions and the date of submission are correctly indicated.		
4. The authors and quality reviewers agree on the usage of their personal data.		
5. The figures and images are well visible.		
6. The visual format of the document enables efficient consultation in electronic and paper format.		
7. The references follow the same style and all abbreviations are explained.		
Results	The deliverable is ready for the quality review	The deliverable had to be modified

Table 2. Checklist for deliverables

RESET suggest the following methodology for the definition of the tasks' execution (see Table 3).

Key questions	Additional questions	Example Task RESET – engaging laboratories as drivers of change among their community: *identification and collection of the labs' initiatives in terms of GE and diversity. It includes organization of local workshops and co-design activities.*
Why?	• What is the ultimate goal of this task? • What are the expected results?	1) Raise awareness on GE and diversity issues in research environment, motivate communities to create and implement new initiatives. 2) Promote local initiatives of labs and further disseminate good practices; make international benchmarking. 3) Ensure active usage of the RESET platform. 4) Foster work of other tasks of the project. 5) Provide information and data for case studies for GEBs. 6) Promote RESET and its objectives *(added value).* 7) Promote and raise awareness on GIA tools *(added value).* 8) Contribute to GEP' tasks (if relevant). 9) Contribute to the dissemination of common standards and practices in the European Research Area.
Who?	• Who is concerned by the action/task? • Directly/indirectly? • *Characteristics, number of stakeholders*	Laboratories (research performing organizations): directly – heads of laboratories, researchers, all personnel. *According to multiple studies and local context analysis, these target groups do not always reveal positive attitude towards the objectives of the project.*
What?	• What is the action about? • What are we going to do? • *Object, nature of the task*	Collect and promote ideas undertaken by the labs; organize workshops to raise awareness and accompany them.
Where?	• When is it supposed to be done?	General duration – M1-M48 of the project. Direct contact with labs has to be established since the

	• What is the duration? • What is the deadline? • *Time constraint*	beginning of the project (with the support of Vice-Rector (VR) for Research). The deadline for collection of initiatives is M26. The deadline for deliverable submission is M28.
How?	• How are we going to do that? • *Methods, procedures, materials*	The Task Leader prepared a survey in English that has to be disseminated (if needed, translated into local language) to all local labs in order to collect their initiatives. The local approach of contacting these structures has to be discussed and validated by the VR for Research/any other hierarchical leader. While contacting the labs, the RESET teams have to suggest joint activities and/or interventions (workshops) to promote RESET and gender equality.
How many? How much?	• What is the number and/or costs?	Reach out to all RPOs (numbers vary locally); some additional costs may be foreseen for printing of materials (posters, flyers, science café).

Table 3. RESET – definition of the strategy for the task

3.2 RESET communication, dissemination and exploitation

Communication, dissemination and exploitation of results have to be elaborated and applied to maximise the impact of the project.

The *communication* in the EU funded projects is called to illustrate the added-value of the research projects by showing how European collaboration can contribute to tackling societal challenges, how the outcomes are relevant to our everyday lives. It enables better use of results (European Commission, 2014). It has to represent the impact and benefits of EU-funded research and innovation activities, as well as to inform about and promote the project and its results/success in a non-technical manner and through strategically planned actions (European IP Helpdesk, 2022). In general, communication aims to increase visibility and awareness of the project existence, its goals. It has to be led before, during and after the project's lifetime.

Dissemination concerns transfer of knowledge and results to enable their societal use and reuse. It is a planned process that consists in providing stakeholders with information on the quality, relevance and efficiency of the project results. The communication is closely interrelated with dissemination: e.g. an article or a poster can incite readers to consult the actual results of the project. However, communication covers the whole project and has multiple audiences, when dissemination starts only

when the results are ready and is targeted at special audiences, enabling them to appropriate the results (European Commission, 2018).

At the same time, *exploitation* of results aims to effectively use/reuse project's results through scientific, economic, political or societal exploitation: e.g. by other people/organizations/projects (European IP Helpdesk, 2022). Exploitation also allows constructing activities and tools that will help to go beyond the project's goals, as well as to exploit the results of work to create something else, maximizing in this way the impact of the project.

> **TIP**
>
> The EU IP helpdesk can be consulted directly (https://www.iprheldesk.eu). It also publishes guides and organizes webinars to manage IP questions while drafting CA.

Therefore, communication, dissemination and exploitation are contractual obligations in the GA.

A strategy for communication, dissemination and exploitation has to be drafted along with the proposal of the project, and to be updated regularly during its duration. This can be done by the means of the Dissemination and Communication Plan - DCP, which should define the problem that has to be addressed through the communication, identify the target groups and stakeholders, describe communication and dissemination measures and channels, as well as to set and update KPIs. The communication and dissemination tasks are usually grouped in one WP, led by a partner. Certain communication tasks can be even assigned to the subcontractors, e.g. running of a conference. However, the communication strategy and activities have to be supported by the coordinator and include partners' contributions (e.g. uploading of project's videos to the YouTube depository).

One of the main elements of project's communication is the creation of visual identity: logo, templates, and visual identity manuals. They are complemented and have to be followed while implementing the project's website, newsletter and running accounts on social networks.

> **TIP**
>
> The careful analysis of relevant communication means and required skills should be done in advance (proposal/beginning of the project stage) to select those that are the best adapted to the target audience, content (visual or text information), project's objectives and impact.

The information about social media accounts, communication and dissemination activities, publications and impact has to be included in the reporting on

communication and dissemination activities to the EU - through the periodic reports and completion of the corresponding templates (see DCP – RESET, 2022).

> *TIP*
>
>   While creating the logotype of the project, make a census of similar projects, their logos and colours, so that your project can be easily distinguished and identified.

Among other contractual obligations for communication, there is a requirement for:

- Visibility of EU funding (Article 27).
- Management of publications through the Open Access (see "Data Management" part).
- Promotion of the project and participation in events, conferences.

> **Good practice**
>
> ➢ Establish a generic institutional e-mail for the project – to be used as an entry point for the target audiences.
>
> ➢ For the presentations: no need to overlod the slides of presentations with text; slides have to be precise, concise and go directly to the point; max. 5 min per slide ("mind mapping[7] and "pecha kucha" methods can be used as alternatives).

As RESET is a CSA action which aims to produce cultural and institutional change, the communication part is extremely important. One of the focal points of the communication is drawing the attention of the university communities to the need and benefits of change, as well as to inform some external stakeholders, enhance reputation of the universities and promote results of the project.

The dissemination activities implemented by the RESET combine a set of mass-media communication and interpersonal communication. Due to natural diversity across partner institutions and their communities, it is important that project communication and dissemination activities are tailored accordingly, favouring decentralisation and adoption by all.

While the RESET dissemination and communication strategy is elaborated and regularly updated in the DCP, the strategy for exploitation is more recent, as it concerns the first results of the project. The management of the intellectual property throughout the project is done according to the rules established in the Consortium

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[7] A diagram or a visual representation of information making certain level of hierarchy of links between objects. More at https://www.mindmapping.com/

Agreement. Moreover, the overall IP approach of the RESET is to deliver to HEIs and citizens open source and/or public domain intellectual property, licenced under Creative Commons CC-BY-NC 4.0.

TIP

While thinking out a strategy for dissemination and exploitation of results one should bear in mind the following questions:

- What are the results of the project?
- Which goal do they follow/help to achieve?
- What are the final or potential users or recipients?
- In which context will they be presented?
- In which form partners will receive the feedback?
- What will be the added value of such dissemination?

Useful sources and links	
RESET Dissemination and Communication Plan, including links to Zenodo collection, website and dedicated pages on each partner institution website	https://wereset.eu/wp-content/uploads/2022/09/D8.1_v3_submitted.pdf
Science communication agency	https://agentmajeur.com/
Horizon magazine	https://ec.europa.eu/research-and-innovation/en/horizon-magazine
Events on the Commission's Research & Innovation website	https://research-and-innovation.ec.europa.eu/events/upcoming-events_en
Success stories	https://ec.europa.eu/research-and-innovation/en/projects/success-stories
Gender Equality Strategy portal	https://composite-indicators.jrc.ec.europa.eu/ges-monitor

3.3 Monitoring of impact and sustainability

Each EU funded project should think out its *"pathway to impact"* – logical steps towards the achievement of the expected impacts, including the period after the end of the project. This pathway begins with *results* – achievements made during or right after the implementation of the project. Project partners have to communicate, disseminate

and promote their exploitation, so to achieve the *outcomes* – medium-term effects of the project, obtained through the utilisation, diffusion and use of the results. These outcomes enable the scientific, economic and societal *impact* of the project (European IP Helpdesk, 2022).

The impact of the project is usually measured with the help of indicators (can be set in the proposal stage), which are regularly measured and updated if needed. In addition to that, the project manager has to choose how to monitor success of actions/tasks (team work, follow-up documents, intermediary assessment, logbook, individual monitoring grids).

RESET integrates several specific tasks and deliverables, which help to elaborate the impact pathway and sustainability of the project. They consist in providing a knowledge base for policy makers, funding agencies, HEI and also producing a white paper, policy briefs and an exploitation roadmap for the project and the network.

With the implementation of any project, its authors aim to *achieve impact maximization,* which implies allocation of available resources in the best possible way to have as much impact as possible. In RESET, we try to achieve that by combining the execution of multiple tasks in one activity. It saves project's human and technical resources, allows to achieve various indicators and contribute to multiple tasks simultaneously. This process is described schematically in the figure 8 below.
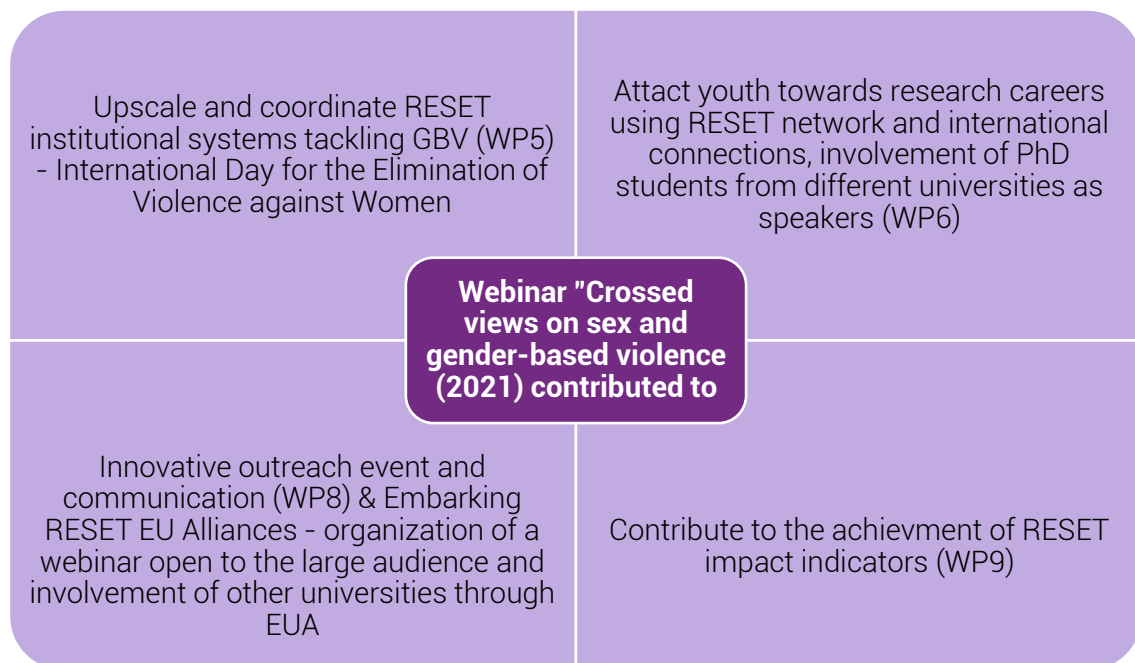
Figure 8. Example of synergies between tasks and WPs

3.4 Data management

H2020 projects have obligations related to Open Science (see articles 29.2 & 29.3 of the GA). In particular, researchers must commit to deposit their publications in an open archive (e.g. Zenodo) within 6 months after publication. Openness also concerns the data related to the project. *Data Management Plan* - DMP usually represents one of the first deliverables, and it lists the data used and created by the project; describes the way they are stored and, if necessary, made accessible.

Open Access is a practice of providing online access to scientific information (peer-to-peer reviewed articles, publication and research data). This information can be accessed free of charge and be re-usable, to facilitate and improve circulation of information in the European Research Area.

The RESET Consortium members are strong advocates of open access and the open source culture and research. All content issued in the context of RESET will be published in open access and archived on the Zenodo[8] file repository, licensed under Creative Commons CC-BY-NC 4.0 to ensure its wide adoption and replication by all other European citizens and institutions within the ERA. RESET gives priority to the "green access model".

Open Access modalities include the following steps (Dello, 2015):

1. Deposit machine-readable electronic copy in repository, at the latest upon publication.
2. Ensure open access to the deposited publication (green or gold open access models).
3. Deposit "metadata" in order to maximise discoverability of publications and ensure acknowledgement of EU funding (terms: "EU", "Horizon 2020", name of the action, grant number, publication date etc.) and retain copyright and licence to publishers.

In line with the open access principle, the project's beneficiaries have to put effort into making their data findable, accessible, interoperable and reusable (FAIR principles). It enables better management of knowledge and innovation, as well as subsequent knowledge integration and reuse (European Commission Directorate General for Research & Innovation, 2016).

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[8] Zenodo platform at https://zenodo.org/

To conform to all aforementioned requirements, a project has to develop and follow a DMP. The DMP has to demonstrate respect of the national and international regulation (GDPR) and concern all the processes related to the management of data by partners. In the case of RESET, the DMP adapts to and integrates certain internal institutional data handling procedures. It specifies the types of data that will be collected (e.g. anonymized or personal direct/indirect), processed and/or generated, describes the applied methodology and standards, indicates whether they will be made available or used internally and how they will be curated and stored (including after the end of the project). The DMP of the RESET also establishes a set of common guidelines for partners concerning data protection and ethics.

The DMP has to be updated all along the project with the appearance of new data, changes in the consortium policies (e.g. decision to file a patent), changes in consortium composition etc. (European Commission Directorate General for Research & Innovation, 2016). The minimum period of update is aligned with the project periodic reports.

To manage data coordination and storage, RESET partners agreed to separate data flows into the following ones:

- *external* (data made public with deliverables, publications and other communication)
- *intermediary – at the level of consortium* (all data and outputs are centralised on the project's depository – NextCloud, where partners share only anonymized information or the information necessary for the execution of certain tasks – e.g. in conformity to the consent forms)
- internal – at the local level (partners are able to organize the data communication flow with available and recommended internal means – institutional depository, intranet etc.)

During its first data collection process, the RESET project implemented the following procedure of data management (Figure 9).

In case of projects as RESET (where data exchange can be required), the partners may include special provision and/or articles on the data sharing and protection principles and responsibilities to the consortium agreement or to draw an amendment to it. This is why RESET partners decided to elaborate and sign a separate Data Protection Amendment, which defines data processing responsibilities of each party (upon consultations and validation of local Data Protection Officers - DPOs).

Data Managment Plan	Privacy Notice and consent forms	Ethical review	Data collection	Data processing	Data publishing
• Preparation of a detailed plan of what data the project will collect and how it will process it	• Compliance with GDPR & Ethics principles	• The procedures for the collection of data reviewed and validated by local Ethics committees and Ethics Advisor	• Follows the best practices Human Science field and the DMP • Use of a secure local and project's storage	• Minimisation and analysis of RESET data following the DMP • Use of secure workflows	• Information about collected data is open • If possible, datais shared on requests according to consent given

Figure 9. RESET data management procedure

Good practice

➢ To save resources and time, partners have to define and specify data processing mechanisms (including anonymization) at the moment of the project's conception and proposal.

➢ Before sharing any personal data with other institution, apply the procedures of anonymization – make sure that there is no personal data (no possibility for identification), or that usage of personal and sensitive data is justified, as well as individuals, who agreed to provide their personal data, had signed the consent forms.

Useful sources and links	
RESET Requirements for the protection of personal data (POPD) – Data Management Plan	https://wereset.eu/wp-content/uploads/2022/09/D9.5-RESET_DMP_v2.0.pdf
Guidelines to the Rules on Open Access to Scientific Publications and Open Access to Research Data in Horizon 2020	https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf
OpenAIRE platform	https://www.openaire.eu/
European data protection supervisor:	https://edps.europa.eu/
European Charters for researchers (Code of conduct):	https://euraxess.ec.europa.eu/sites/default/files/am509774cee_en_e4.pdf

Sherpa Romeo is an online resource that aggregates and analyses publisher open access policies from around the world and provides summaries of publisher copyright and open access archiving policies on a journal-by-journal basis.	https://v2.sherpa.ac.uk/romeo/
Data Management Planning by Finnish Social Science Data Archive	https://www.fsd.tuni.fi/en/services/data-management-guidelines/data-management-planning/
Anonymisation and Personal Data by Finnish Social Science Data Archive	https://www.fsd.tuni.fi/en/services/data-management-guidelines/anonymisation-and-identifiers/
Aalto University Research Data Management and Open Science Training	https://www.youtube.com/channel/UCGKa3aPA AZLaYqrZnoarDxw
Gender-sensitive data collection and monitoring: the experience of CEU	https://www.superaproject.eu/gender-sensitive-data-collection-and-monitoring-the-handbook-developed-by-ceu-soon-available/
What is GDPR processing agreement	https://gdpr.eu/what-is-data-processing-agreement/

3.5 Ethics in RESET

According to the GA, all the research and innovation activities carried out under Horizon 2020 shall comply with ethical principles and relevant national and international legislation, including the Charter of Fundamental Rights of the European Union and the European Convention on Human Rights and its Supplementary Protocols. The process to evaluate the ethical dimension of activities funded under Horizon 2020 is called the Ethics Appraisal Procedure. The latter includes the Ethics Review Procedure, conducted before the start of the project, as well as the Ethics Checks and Audits, which may take during and after the project's lifetime (Paternoster, 2016).

The GA stipulates that in case there is activity raising an ethical issue, each beneficiary must have obtained opinions of ethics committee and authorisations for such activity required under national law before its beginning. These documents have to be kept on file and submitted to the Agency in case of request. In the context of the GDPR, management of personal data can be one of the ethical issues to be taken into account in the project. The partners may require to contact and consult the Data Protection

Officer (DPO) or Ethics Committees. The constant monitoring of ethical aspects is reflected in the DMP.

> ✏️ **TIP**
>
> Particular attention shall be paid to the principle of proportionality, the right to privacy, the right to the protection of personal data, the right to the physical and mental integrity of a person, the right to non-discrimination and the need to ensure high levels of human health protection (Markez, n.d.)

In addition to that, the process of appointment of an independent Ethics advisor can be foreseen at the moment of proposal (as in RESET) or such appointment can be requested by the Commission. One of the tasks of this expert may be to report to the Commission on compliance with the requirements included in the Ethics Report. In RESET, as soon as consent forms and procedures around data collection were ready, they were submitted to the Ethics advisor for an approval/opinion. In addition to that, WP9 leader regularly consults the EA on the matters related to the sphere of ethics and data protection (e.g. running of the media campaign or questions of gender, scientific excellence and ethics).

> ✏️ **TIP**
>
> Upon RESET experience, it is recommended to carry out the selection of a candidate of an Ethics Advisor at the moment of drawing the proposal. It will not only allow to run necessary consultations for the Ethics review, but will also help to structure the data collection procedures and human involvement in GDPR/ethics conformant way. The selection of Ethics Advisor for equality-related projects may reveal itself as time and resource consuming, since the candidates do not only have to be experts in ethical and data matters, but also be acknowledged with the concepts of gender studies.

The ethical evaluation by the European Commission may add to the project a requirement to submit ethical or GDPR deliverable. RESET has prepared and submitted two Ethics deliverables:

- Protection of Personal Data – POPD, which demonstrates how RESET data collection, process, storage, protection etc. comply with the national and European Union legislation. It comprises the technical and legal framework designed to ensure that personal data are safe from unanticipated, unintended or malicious use, as well as identifies which types of data are collected.
- Involvement of Humans – Requirement No.2 addresses the ethics requirements identified regarding human participation in the RESET project. It provides insight into ethical issues regarding human participation and how to address them. It

also presents a template for the informed consent form and information sheet for the participation of humans in the RESET actions and/or activities.

Good practice

➢ Depending on the scale of data collection of the project, the DPO(s) may require to run the Data Protection Impact Analysis. In this case, the project managers and researchers need to run consultations with GDPR, IT and legal experts/research support services, as well as to consult national and European requirements for the concerned types of data collection.

Useful sources and links	
Ethics and data protection	https://ec.europa.eu/info/sites/info/files/5._h2020_ethics_and_data_protection_0.pdf
Ethics, self-assessment guide	https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/ethics/h2020_hi_ethics-self-assess_en.pdf
Evaluation of H2020 project proposals – experts search	https://app.powerbi.com/view?r=eyJrIjoiYTIzZjFlZGUtNjlkZi00ZTRmLTg4NmUtOGFlMWRmY2JmMWM5IiwidCI6ImI3YjAxMGE3LTBkN2YtNDU0MS05YjIwLWUxYzk1YmQ1OGNlOCIsImMiOjl9
Informed consent guidelines provided by the Erasmus University Rotterdam	https://www.eur.nl/en/research/research-services/research-quality-integrity/ethical-review/informed-consent
Ethical handling of incidental findings in research	https://www.youtube.com/watch?v=vhp0g-SMZGY
Ethics and data protection 14 November 2018	https://ec.europa.eu/info/sites/default/files/5._h2020_ethics_and_data_protection_0.pdf
Ethics in Social Science and Humanities	https://ec.europa.eu/info/sites/default/files/6._h2020_ethics-soc-science-humanities_en.pdf

4   Other aspects

This chapter includes other aspects related to the management of international projects, namely such as management of change, collaborative work and co-design, as well as the societal and environmental responsibility.

4.1 Change Management

While managing the project and assuring its quality, one aims to produce the change. The change is a sufficiently significant break in one of the elements of the project requiring an effort of adaptation.

Theory of change – a summary of how change is expected as a result of set activities (Figure 10). It includes the problem, the intended change and planned activities. This theory can be taken as an approach of the organisation, it has to be regularly updated and involve stakeholders (Estonian Social Enterprise Network, 2017; RESET Capacity building session run by ScPo partner - June 2021).
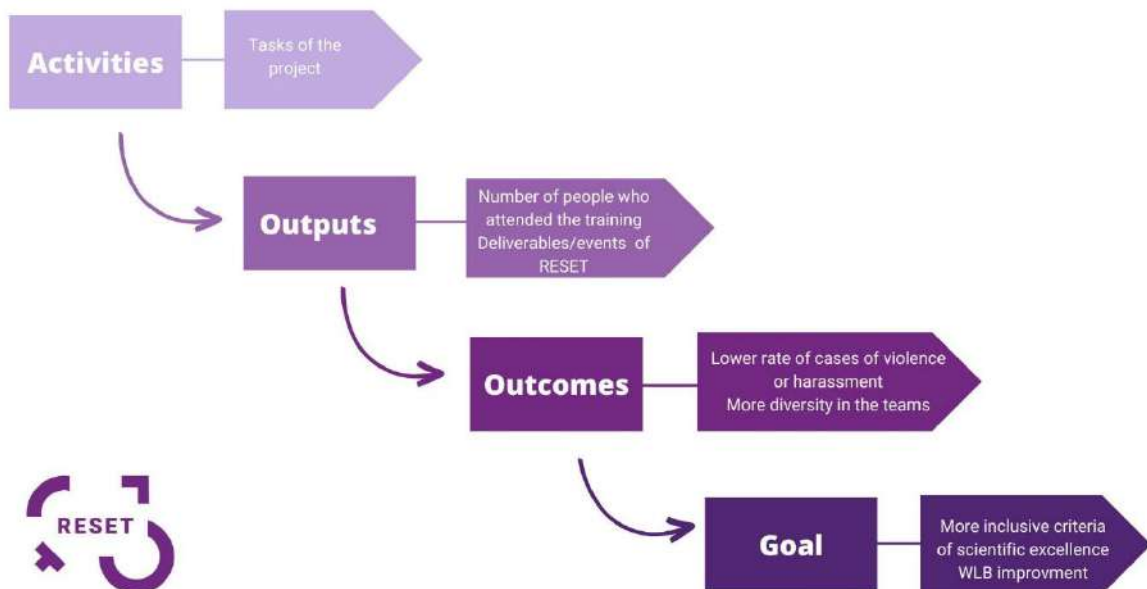
Figure 10. Theory of change - example of application in RESET

In order to apply the theory of change in practice – produce cultural and institutional change, RESET follows the principles of the change management (PROSCI, n.d.) – Figure 11.

Awareness (what is the nature of change? why is it needed? what is the risk of not changing?)

Desire (what is in it for the organisation/individuals?)

Knowledge (understanding how, training on new processes and tools, learning new skills)

Ability (capability to implement the change, achievment of the desired change in performance or behaviour)

Reinforcement (action to increase the likelihood that a change will be continued; recognition and rewards that sustain the change)

Figure 11. 5 elements of successful change

With these principles, we can see that organisational outcomes (increase in GE indicators, scientific excellence labels) are the collective results of individual change implemented with the help of action plans (in RESET – Gender Equality Plans). The methodology of the RESET and multiple other sister projects is based on the GEAR tool[9] that provides all necessary elements to get to the stage of knowledge, i.e. creation of the Gender Equality Plan. However, one of the main challenges within this type of project is to pass to the state of "Ability" and implement the actions, measures and produce the desired change. Moreover, an additional plan for sustainability and reinforcement of achievements has to be conceived, so as to promote the change and value the contributors, inciting them to continue.

4.2 Team Management Aspects

One of the objectives of multiple EU funded projects is to gather together stakeholders from different countries and tackle common challenges. This approach is complex in terms of adapting measures and actions to the different contexts, but it also reveals how international cooperation and diversity of backgrounds and opinions enrich the processes and results. To manage international teams, project managers have to pay attention to the next aspects:

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[9] GEAR tool available at https://eige.europa.eu/gender-mainstreaming/toolkits/gear

- Construction and maintenance of effective communication and trust - they are keys to project success: clear, concise and timely messages, as well as proactive and positive attitude; they may also reduce the administrative burden.
- Attention to cultural differences (from simple matters as time zones, bank holidays to differences in contexts – institutional rules and habits in communication).
- Work-life balance matters and adaptation to the local contexts (e.g. no e-mails after certain hour and on weekends; home office flexibility; filling in of calendars indicating absence and national/institutional holidays) can help to avoid exhaustion of human resources and favour collaborative spirit. Moreover project managers and scientific coordinators have to keep in mind the equality and diversity in participation and representation in conferences or other project events – keeping in mind particular barriers and obstacles that can prevent different members of the teams from taking part.

TIP

The intercultural management implies that:

- Comprehension between parties is not self-evident.
- Communication processes are not linear.
- Dialogue skills are essential.
- Understanding of local context matters.

4.3 Co-design

One of the main objectives of RESET is to co-design Gender Equality Plans and efficient actions that can be adapted to different contexts. Through collective intelligence RESET fosters the emergence of upgraded, pragmatic, user-centred action plans, which support structural and cultural change, capitalising on each institutions' experience (Co-design starter kit, RESET, 2021). For this purpose, RESET applies a co-design approach. Co-design refers to "collective creativity as it is applied across the whole span of a design process" (Sanders & Stappers, 2008).

The challenge of the co-design in RESET underlies the fact that the co-designed activities have to be up- or down-scaled depending on the concrete task and partner's context. In the same way, as co-design methods and tools have to be carefully selected to fit to the objective of the action, the co-design of such outputs as Gender Equality plan or decision-making strategy have to be discussed and regulated in advance. This means that the process of the co-design may be time and resource consuming for partners, though very effective in terms of results. The general rule here is to anticipate the scale, workload and risks as soon as possible while preparing the task.

Useful sources and links	
RESET co-design starter kit	https://wereset.eu/deliverables/co-design-starter-kit/
Participatory techniques – SUPERA project	https://www.superaproject.eu/participatory-techniques/

4.4 Societal and environmental responsibility

By promoting gender equality and diversity, RESET implies and targets strong societal responsibility, though we believe that this concept cannot go without an environment. With the recent reports on climate change, current societal events, and natural disasters, the EU projects cannot stand aside. Massive reductions in CO_2 emissions are required in all sectors. RESET partner institutions have been promoting active pro-environment policy and the RESET project is an accompanying force in this matter

Due to the COVID19 sanitary crisis, the RESET team decided to avoid any international or national meetings during its first year of execution - 2021. At the beginning of the project, the partners also established a list of travels limiting flights to travels considered inevitable (e.g. consortium meetings or important conferences in the field). This list is constantly updated and decisions are taken during the common meetings. This implies replacing the activities that were traditionally mostly performed face-to-face by remote ones. Moreover, the partners stick to the principle of undertaking a train trip instead of the plane when it is possible (e.g. between two countries that share the border).

For the rest of the meetings, RESET team members (in line with their institutions' practices) choose to lower the transport- and meetings-related environmental impact and to:

- Run events in the virtual format (WP leaders, WP and ad-hoc meetings are run online, as well as project adopts workshops and seminars to the virtual format too).
- Choose sustainable, locally produced food to reduce greenhouse gas emissions and boost the circular economy: vegetarian options and reusable cutlery will be made available for participants of the event on site.
- Ensure event materials are reusable or can be recycled.
- Opt for equipment that consumes little energy.
- Promote the responsible use of resources on site: limit on the number of pages printed per person; reduce the use of air conditioning; install water filling stations to cut plastic waste.

- Ensure the sustainability of the event venue: energy saving and avoiding waste space.
- Communicate with RESET audience to raise awareness on the connection between societal and environmental issues.
- Promote the responsible use of resources on site: limit on the number of pages printed per person; reduce the use of air conditioning; install water filling stations to cut plastic waste.
- Ensure the sustainability of the event venue: energy saving and avoiding waste space.
- Communicate with RESET audience to raise awareness on the connection between societal and environmental issues.

5   Conclusions

The current document entitled "RESET project management toolbox for a project such as RESET" outlines the project's strategy in terms of coordination of the European project and its administrative, financial and technical aspects. It provides an insight into the framework and functioning of the H2020 funded projects and reflects the particularities of the coordination and support actions.

This document offers a set of various tools: templates, good practices, tips, checklists, useful links and sources, and will serve as the main guide to support qualitative management of the RESET consortium.

Annex 1 – Strategies for stakeholders' management

Type of audience	Strategy
Followers	Inform, favour and value their initiatives and actions.
Activists	Provide a framework, involve them into actions, meetings, rely on them while defending the ideas of the project.
Support	Know how to identify them and choose them as a driving force (to move to the objective); dedicate time to them.
Passive	Inform them and demonstrate that their opinions are valued; listen to their problems; look for common interests.
Hesitating	A priority target group – has to be informed of everything what is done in the project; consult them and provide arguments; demonstrate that you consider their opinions.
Grumpy	Listen and inform them; consider their sayings, as they are excellent sources of information.
Opponents	Not the target audience; "cut" the objective into blocks and make them to accept some small pieces; try to obtain their neutral status.
Revolted	Not useful to spend some time to change their opinions or attitudes, they will not change them.

Table 4. Strategies for stakeholders' management (Training session, University of Bordeaux, 2022)

Annex 2 - Project internal calendar

		x-absence					bank holidays/national days-off period of absence													
	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
Name, surname of a RESET team m	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
Person X UBx																				
Person Y UBx																				
Person X ULodz																				
Person X (RUB)																				
Person Y (RUB)																				
Person X AUTH																				
Person Y AUTh																				
Person X U.Porto																				
Person Y U.Porto																				

Figure 12. Example of internal calendar

Annex 3 – Project calendar of events

RESET	Year X											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
WP1 meeting												
WP2 meeting												
WP3 meeting												
WP4 meeting												
WP5 meeting												
WP6 meeting												
WP7 meeting												
WP8 meeting												
WP9 meeting												
Capacity building sessions												
Webinars												
Internal trainings and workshops												
Meeting in relation with particular tasks												
Other project events												
Meeting with external stakeholders (sister projects, EUAs, other projects)												
Co-design session												
WP leaders meeting												
Consortium meetings												

Figure 13. RESET calendar of events

Annex 4 – Template for agenda, minutes and To-do list in RESET

RESET agenda - template

Detailed Agenda - RESET Consortium Meeting in *[location and time]*

Day/Session *X – MM DD, YYYY [Time zone]*

Venue: *[adress]*

[Virtual connection link]

The programme				
Local Time	**Time Zones**	**Duration**	**Action**	**Goal/Task**
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	*Arrival of participants and welcome*	● *Team meet & great*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Introduction**	● *Scientific coordinator/host of the event*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min ex: 20 min. + 10 min. questions	**Coordination of the project**	● *Overview of project's timeline and milestones* ● *Risks evaluation and mitigation* ● *Reminder: financial and administrative practices; reporting*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**WPs' technical sessions (adapted to the current state and milestones)**	● *WP's timeline and progress made* ● *Presentation of deliverables* ● *Outlook to the future activities and events*

				● AOB
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Presentations of other subjects (particular tasks, deliverables, events)**	● *[TBD]*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Presentations by guest speakers** *[TBD]*	● *[TBD]*
X:00 - X:YY		X min	*Break*	
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**WPs' technical sessions (adapted to the current state and milestones)** *[TBD]*	● *WP's timeline and progress made* ● *Presentation of deliverables* ● *Outlook to the future activities and events* ● *AOB*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Brainstorming/co-design workshops** *[TBD]*	● *[TBD]*
X:00 - X:YY		X min	*Break*	
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Feedback of Advisory Board members & Ethics Advisor – pt II**	*Quality assessment, observations and recommendations for the pursuit of the project, based on project data, GEPs implementation process, other tasks and deliverables*
X:00 - X:YY	X:00 - X:YY (Fra, Ger, Pol) X:00 - X:YY (Gre, Fin) X:00 - X:YY (Por)	X min	**Round table discussion** *[TBD]*	● *[TBD]*
X:00 - X:YY			*End of the session*	

RESET Consortium meeting

Minutes – *[day/session X]*

[Location and time]

Meeting Details

Date:	*[MM DD, YYYY]*
Time:	0X:00 am - 5:00 pm *[time zone]*
Location:	*TBD*
Meeting coordinators	*TBC*

Attendees (27)			
Country	**Participant**	**Mode**	**Position**
		[Physical/on line presence]	

Meeting Agenda

[Recap]

Minutes of the session

[Minutes integrate the names of speakers, presentation and comments of the discussion. The "ToDo" list tasks are highlighted in color]

RESET Consortium Meeting – *[Time and location]*

To-Do list

Task description	Purpose	Assignment	Deadline
[TBD]	*[Relation to the GA/other reference]*	*[partner's name]*	*[TBD]*

Annex 5 – RESET reporting calendar

Project period	Months	Period covered	Due date (report to the coordinator)	Completed and submitted to EC	Review meeting
Internal report	M1, M4, M6, M9, M12, M14	M1-M15	M17	M17	M18
EC periodic report	M16-M17	M1-M15	M17	M17	M18
Internal report	M17, M21, M23, M27, M29	M16-30	M32	M32	M33
EC periodic report	M31-32	M16-30	M32	M32	M33
Internal report	M33, M36, M39, M42, M45, M48	M31-48	M48	M48	M48
Final EC report	M47-48	M31-48	M48	M48	M48

Table 5. RESET reporting due dates

Annex 6 – Indicative templates for budget tracker dashboard

RESET budget

What is this document, why and how to fill it?

This document is a template for budget monitoring. It aims to help you foresee your expenses and evaluate your use of budget during the project.

The University of Bordeaux will collect your information to get an overview of the current use of funds and, if needed, to give you advice on how to track your expenses.

Tab list	Purpose	Comments
General information	*Summarizes your information as an institution*	Information used for calculation within the next tabs. **Please insert the name of your institution and your contact person for financial issues**
Costs overview	*Summarizes financial information from the previous tabs*	No information to be inserted in this tab
DoA budget	*Summarizes financial information as foreseen in the DoA (Annex 1 GA)*	No information to be inserted in this tab

RESET budget
General information on your institution

Partner institution	
Responsible person	
Contact person for financial information	
Reporting period	

Budget overview

	Staff costs (actual)	Staff costs (unit)	Subcon tracting	Other direct costs	Indirect costs	Total costs	Linked 3rd party
University 1							
University 2							
University 3							
University 4							
University 5							
University 6							
University 7							
Total grant	0,00 €	0,00 €	0,00 €	0,00 €	0,00 €	0,00 €	0,00 €

Activity per WP per partner - see WT6 Summary of project effort in person-months

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	WP9	Total PM
University 1										
University 2										
University 3										
University 4										
University 5										
University 6										
University 7										
Total Person/Months										

Resources to be committed - Annex 1 GA 3.4 Description of Action

	Travel	Equipment	Other goods and services	Total
University 1				0,00 €
University 2				0,00 €
University 3				0,00 €
University 4				0,00 €
University 5				0,00 €
University 6				0,00 €
University 7				0,00 €
			Total	0,00 €

Detailed information for other direct costs

University X	Cost €	Justification
Travel		
Equipment		
Other goods and services		
Total	- €	

Annex 7 – Deliverable dashboard template

Deliverables List: PROJECT GA N°XXXXXXXXX

Name of the project								
% accomplished	MS related	Task/milestone/ deliverable	Start date	Deadline for EC submission	Real date of submission	Responsible Person's Name	Lead, partners	Note
0%	MS4		MX	MX				
0%	MS4		MX	MX				
0%	MS4		MX	MX				
0%	MS4		MX	MX				
0%	MS4		MX	MX				
0%	MS4		MX	MX				

Annex 8 – Indicative Gantt calendar template

Name of the project	YYYY														
Horizon XXX project	Week			JANUARY				FEBRUARY				MARCH			
University of X - coordinator				W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4
TASK	ATTRIBUTED	START	END	W	W	W	W	W	W	W	W	W	W	W	W
WP1 activities															
Name of task	names of partners	MM	MM												
Name of task	names of partners	MM	MM												
WP2 activities															
Name of task	names of partners	MM	MM												
Name of task	names of partners	MM	MM												
Name of task	names of partners	MM	MM												

Annex 9 – RESET quality review procedure

RESET deliverable: FAQ

Deliverables *are additional outputs (e.g. information, special report, a technical diagram brochure, list, a software milestone or other building block of the project) that must be produced at a given moment during the action.*

SUBMISSION DEADLINE

The date indicated in the RESET GA (Art.19)

VERSION

One version document (unless updates are clearly stated in the GA)

PUBLICATION

After PO (EC) review:
- Project website
- Zenodo

ADJUSTEMENTS*

*(if necessary) can be done following the EC review

REQUIREMENTS & EXPECTATIONS

Agency (EC)	Coordinator	Large audience
The deliverable includes the text: *"This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101006560".* *When displayed together with another logo, the EU emblem must have appropriate prominence".* The deliverable provides information to the Agency and ensures effective monitoring of the project: consistency between PMs/budget allocation and efforts for the creation	• is responsible for the monitoring of submission process; communication with PO on any delays / issues related to the deliverables • verifies that the content considers all relevant project's updates • checks the layout, presentation, consistence of the deliverable (corrects typos, indicates modifications or inaccuracies) • along with the Lead Partner considers changes and/or modifications suggested by the QRs or other partners • is in charge of uploading of final verson to the Portal	• The text of the deliverable must contain a background/context part, which explains to the large audience a need or relevance of such tool, report, event etc. • final readers are not necessarily experts in the subject of GE, please include definitions, translations and abbreviations explained • elaboration of reder-friendly layout *(the document has a clear structure, and a keynote, introduction and conclusion parts)*; please avoid repetitions. • preference for APA style references and bibliography *(if possible provide the first name of the authors)* • It is highly recommended to include visual elements and tables / charts/ figures • all templates, additional or bulky information has to be included in the Annexes

ROLE & RESPONSIBILITIES OF RESET PARTNERS

Quality Reviewers (2 per deliverable)	Other RESET Partners
• verifies that the content corresponds to the description in the GA • Reviews the draft, providing all necessary comments or requests for modification in a timely manner	• Contribute to the Data Collection (if necessary) • Provide inputs & opinions of experts on relevant subjects, methods & approaches

Lead Partner
- is responsible for the final version of the deliverable, its timely submission to the coordinator
- is in charge of layout and follow-up of the timeline
- collects all necessary data and sets the deadlines for partners, quality reviewers
- informs the coordinator on any delays or issues
- is in charge to answer to partners' suggestions and justify the choices

HOW TO DEAL WITH A TIMELINE

Prepare the 1st version of structure of your deliverable

Data Collection & Drafting

Revise the 1 draft

Submit for the QR: at least 80% of the draft is ready

Feedback from QR

Submission

Beginning of the task

On track

at least **2 weeks** before the final submission

1 week - Final review with coordinator

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