

Time Management and Strategy for Researchers and Managers in EU Proposal Preparation

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1 Introduction	2 Proposal Types	3 Time Management	4 Proposal Activities and Personnel	5 Results	6 Times of Personnel Required	7 Costs	8 Recommendations
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1 Introduction

1.1 What is YGGDRASIL?

Symbol of the world-spanning ash-tree in the Nordic Saga, cradling all of human, animal and plant life.

This notion corresponds to our holistic understanding of our services, research and training in environmental fields.



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1 Introduction

1.2 YGGDRASIL Environmental Planning

Consulting, service and research in Geology, Landscape Planning and Ecology. Working in Germany and on cross-boundary projects. Business fields are Fauna Flora Habitat Management and Surveys, Sanitation and Renaturation of abandoned mining and industrial sites, Historical Investigations on abandoned industrial sites and on contamination potential.

Techniques: Geographical Information Systems (GIS), Airborne Data Evaluation, Global Positioning System (GPS), Databases



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1 Introduction

1.3 YGGDRASIL Trainings

YGGDRASIL is specialised in trainings for professionals. The range of topics comprises Environmental Management, Project Management and Time Management of international and EU-Projects.

Since 1999, more than 5.000 customers from private business, research, management and administration have attended YGGDRASIL's courses. YGGDRASIL's expertise is based on more than 20 years experience in academia and more than 10 years experience in the private business.



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1.4 Introduction Proposal Preparation

The ultimate responsibility of the Co-ordinator in proposal preparation is:

“Press the Submit-Button in Time”

All activities and fights with the unexpected are succumbed to this goal. If the manager fails here, there is no excuse. Achieving this goal in due time, in due quality, is a long, sometimes painful track with numerous time-consuming activities. They all have to fit into and to be put on top of the everyday schedule of the SME or RTD institution.



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2 Proposal Types

	FP7 ENV 2007	INTERREG IIIB 2005
Call	ENV.2007.4.1.1.2.	Neighbourhood Programme 4th Call
Title	Contribution to Global Biodiversity Small to Medium Collaborative Project	Contribution to Fauna Flora Habitat Sites
Duration	4 years	1,5 years
EU-Contribution	3,0 Mio Euros	950.000 Euros
Partners	16	13
Countries	9 AT, BG, DE, HU, PL, RO, SK, SRB, UK	7 BG, CZ, DE, GR, IT, PL, SK
SMEs	8	7
Universities	4	3
Research Institutions	1	2
NGOs	2	1
Industry	1	0



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3 Time Management Techniques used in YGGDRASIL

3.1 Daily Documentation

- project-allocated steps
- not directly project-allocated steps

3.2 Occasional Documentation

- detailed time records broken down in minutes of reference dates („Stichtagsmessung“)
- continual documentation of steps



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4 Proposal Activities and Personnel

4.1 Four phases clearly distinguished

I. Ideas Generation and Partner Search Phase

more than $\frac{3}{4}$ year prior to conceptualisation phase, lobby work, finding partners, visiting, networking, finding the proper call

II. Proposal Conceptualisation Phase

week 1-8 after call publication

III. Proposal Finalising Phase

week 9-13, end of this phase is the submission















IV. After - Deadline Phase

after submission, tidy up, document, lessons learned, post project review



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4.2 Proposal Activities

-  Emails
-  Personal Partner-Communication, Visits
-  Research in Internet
-  Creative Planning I (Work Packages, Steps)
-  Text Writing
-  Brainstorming
-  Delegation
-  Technical Tasks for Graphs
-  Proof Reading and Corrections
-  Creative Planning II (Costs and Budget)
-  Cost Tables
-  EPSS
-  Tidy up, Post Project Review
-  Workshop



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4.3 Roles in Proposal Preparation

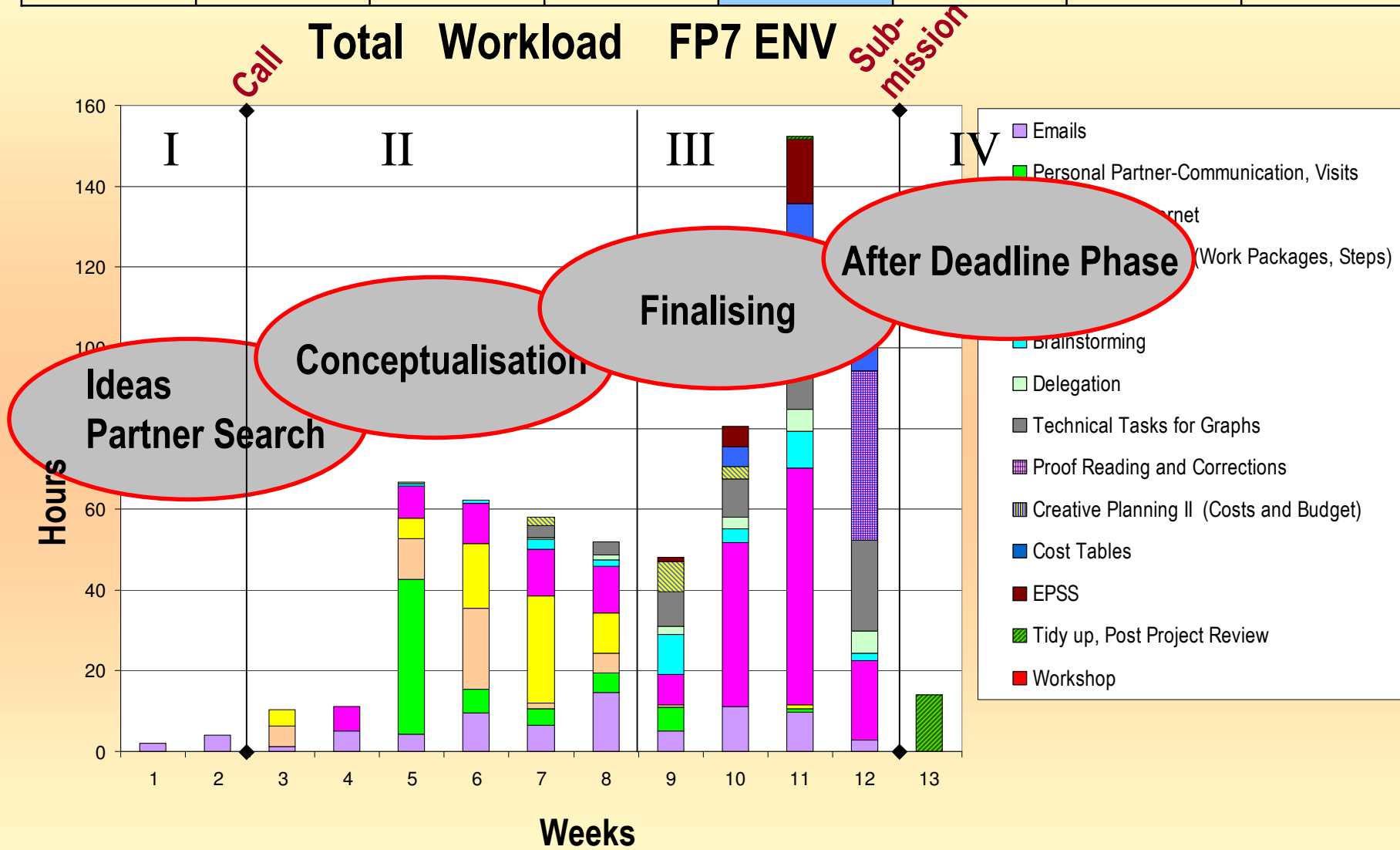
At least three different Roles in Proposal Preparation necessary:

- 1. Coordinator, Scientific Writer**
- 2. Project Manager**
- 3. Technical and Administrative Staff**



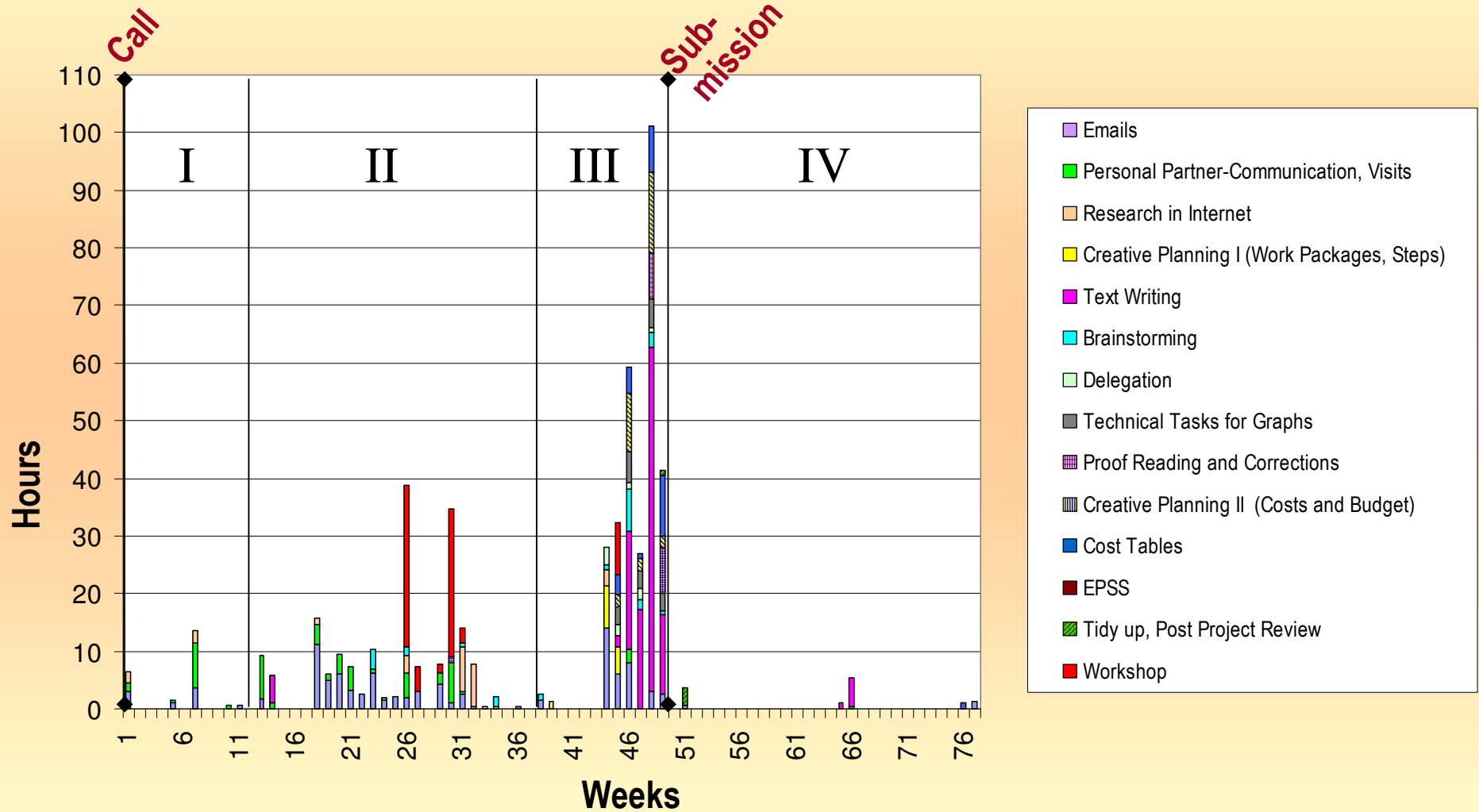
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Total Workload FP7 ENV



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Total Workload INTERREG IIIB

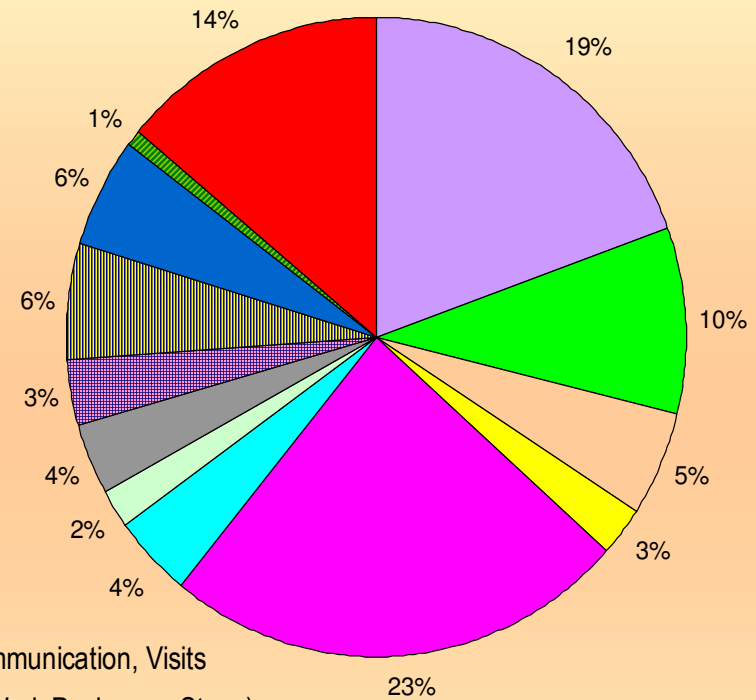
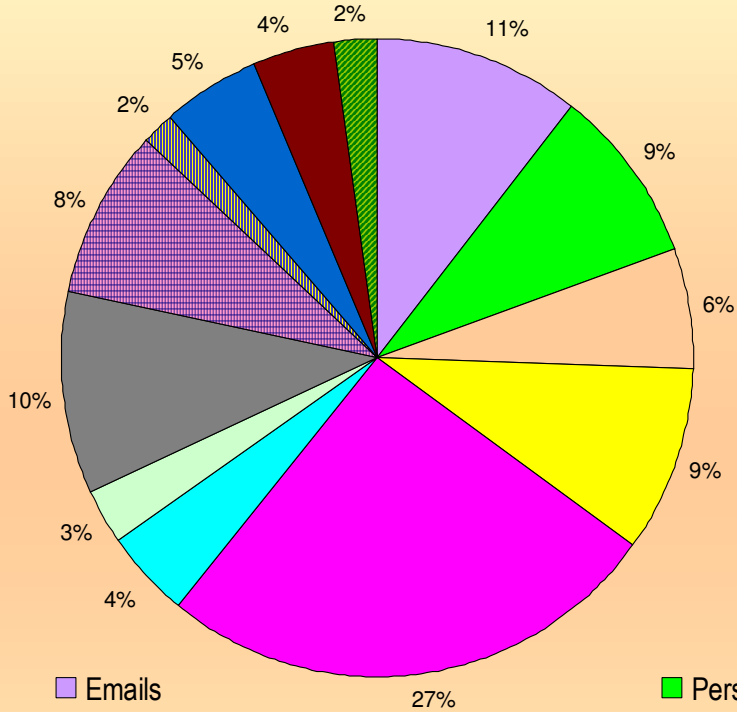


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FP7 ENV

Activities Time / %

INTERREG IIIB

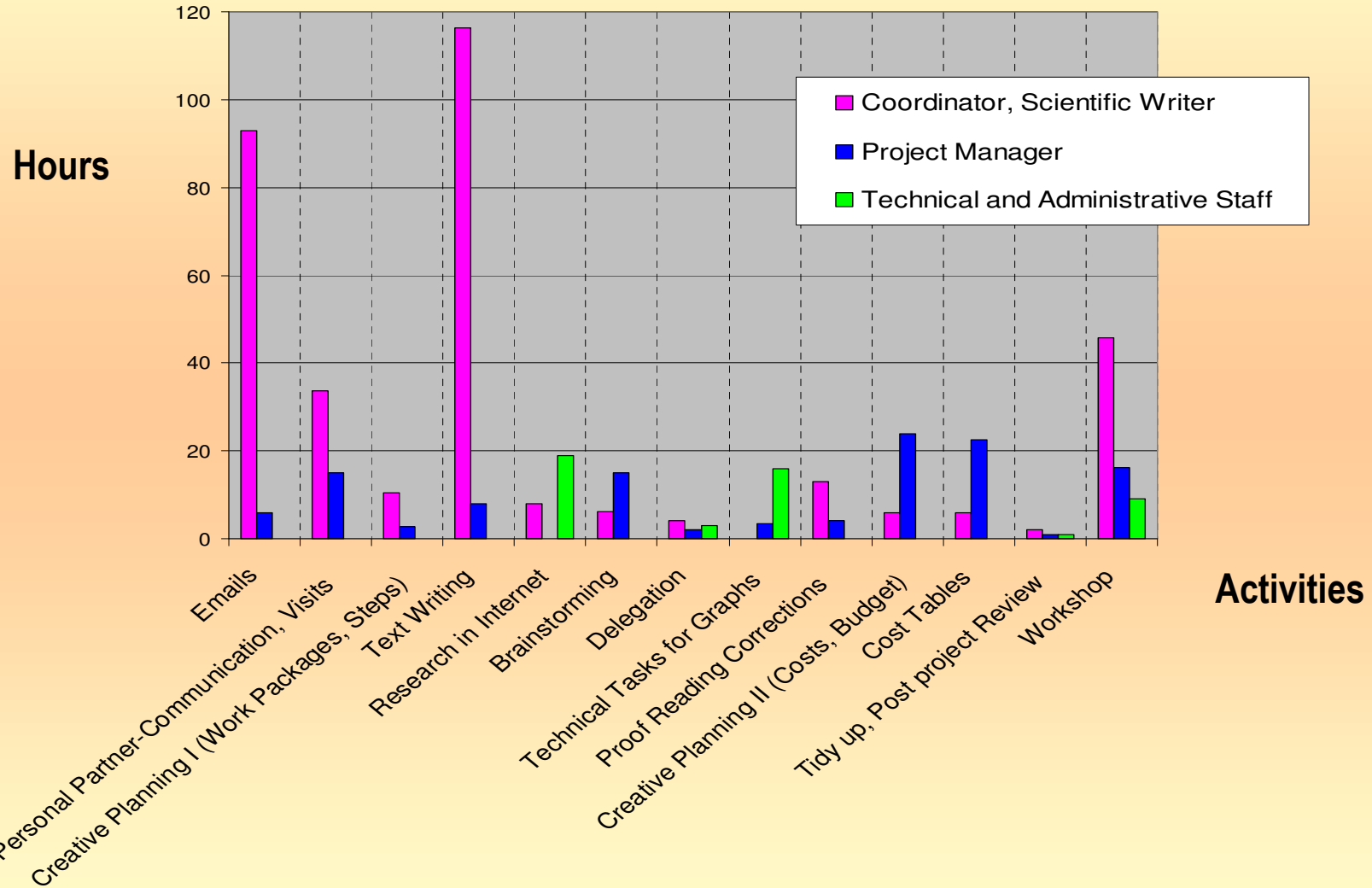


- Emails
- Personal Partner-Communication, Visits
- Research in Internet
- Creative Planning I (Work Packages, Steps)
- Text Writing
- Brainstorming
- Delegation
- Technical Tasks for Graphs
- Creative Planning II (Costs and Budget)
- Proof Reading and Corrections
- Cost Tables
- EPSS
- Tidy up, Post Project Review
- Workshop



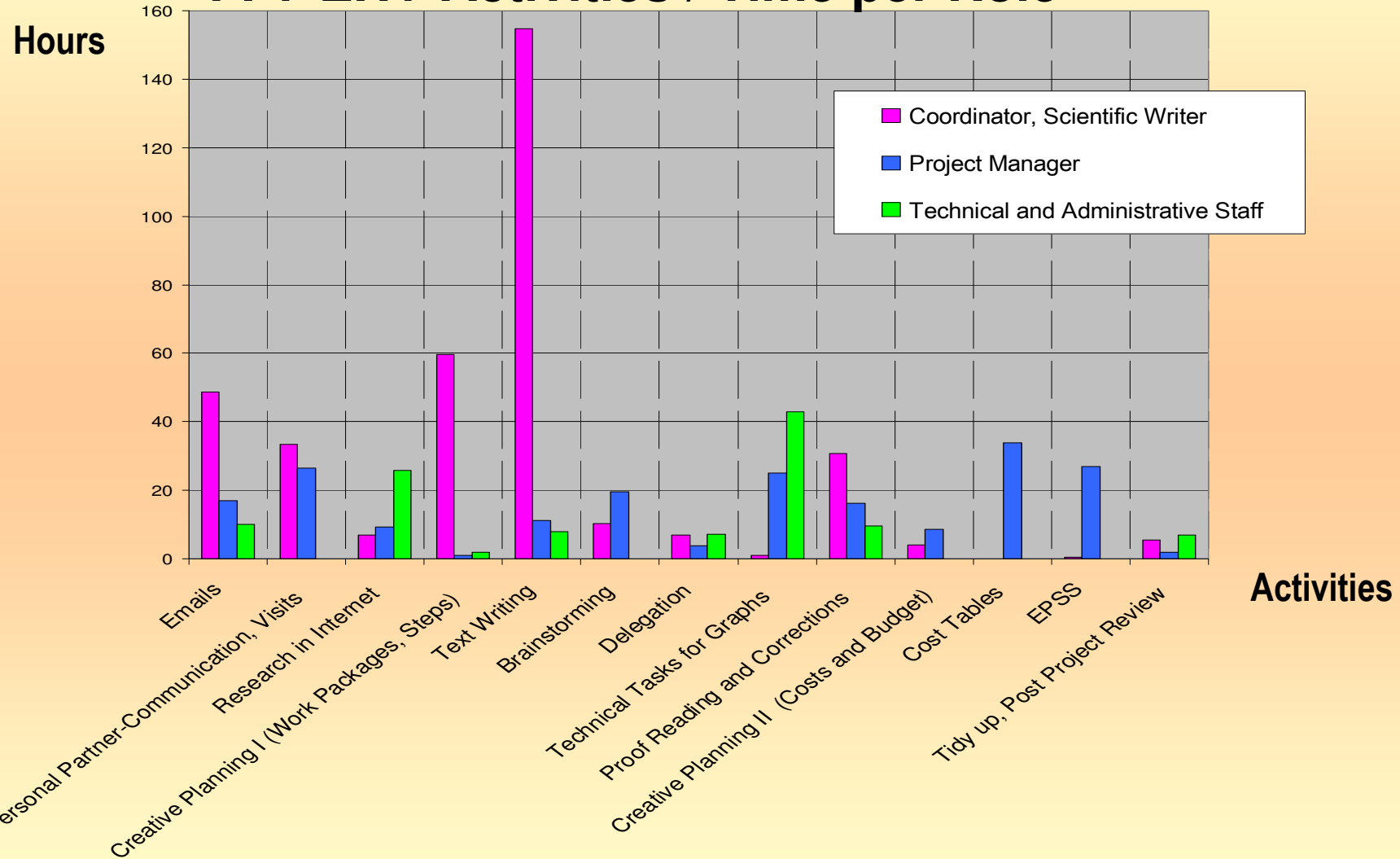
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INTERREG IIB Activities / Time per Role



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FP7 ENV Activities / Time per Role



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7 Costs

	FP7 ENV	Euros / h	Costs FP7	INTERREG IIIB	Euros / h	Costs INTERREG
Workload Sum / h	670			600		
Workload Coordinator	370	70	25.900	350	70	24.500
Workload Project Manager	200	55	11.000	150	55	8.250
Workload Technical Staff	100	35	3.500	70	35	2.450
Personnel Costs			40.400			35.200
60% Overhead			24.240			21.120
Proposal Preparation Costs			64.640			56.320



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8 Recommendations

8.1 Planner for Proposal Conceptualising and Finalising

Step No	Step	Person in Charge	Start week	Deadline Week
1	Emails (writing + administration)	Coordinator	continually	continually
2	Partner Talks	Coordinator	pre-phase	week
3	Creative Planning I (Tasks, WBS, Matrix)	Coordinator	5	7
4	Text Writing	Coordinator	8	13
5	Brainstorming Meetings	Coordinator	9	11
6	Data Search	Technical Staff	3	8
7	Delegations / Explanations	Coordinator + Project Manager	8	12
8	Creative Planning II (Budget)	Project Manager	7	10
9	Cost Tables	Project Manager	10	12
10	Graphs, Diagrams, Technical Tasks	Technical Staff	9	12
11	Proof reading, Corrections	Coordinator + Project Manager	11	12
12	EPSS	Project Manager	10	12
13	Tidy up, Lessons Learned	all	-	13+



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8.2 Structuring the Project Idea for Partner Search

- **Proposal Title, Call No, Budget, Deadline, Duration, Partners**
- **Objectives**
- **Steps in the Project**
- **Expected Results**
- **Interfaces**
- **Resources (Personnel and Equipment)**
- **List of Partners asked for Participation**
- **Next Steps for interested Partners**



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8.3 Workpackage Matrix

No WP / Tasks	Workpackage (WP)	Person Months	SUM Part. Tasks	Person months						
				Part. 1	Part. 2	Part. 3	Part. 4	Part. 5	Part. 6	Part. ...
1	WP 1 Title	28		5	12	0	4	0	7	...
1.1	Task 1.1	4	1	4						...
1.2	Task 1.2	12	1		12					...
1.3	Task 1.3	4	1				4			...
1.4	Task 1.4	1	1	1						...
1.5	Task 1.5	7	1						7	...
2	WP 2 Title	19,5		2	2	2	0	2,5	3	...
2.1	Task 2.1	10	6	2	2	1		1	3	...
2.2	Task 2.2	9,5	4			1		1,5		...
3	WP 3 Title	14,5		0	0	1,5	1,5	1,5	0	...
3.1	Task 3.1	6	2							...
3.2	Task 3.2	5,5	4			1,5		1,5		...
3.3	Task 3.3	1	1							...
3.4	Task 3.4	2	2				1,5			...
4	WP 4 Title									...
...										...
.....										...
	Σ Months	342	Σ/Part.	30	26,5	8,5	9	8,5	24	...



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“After the submission is before the submission”

Thank you for your Attention

and

Good Luck with your Proposals!



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Open Discussion

How is the performance of an FP7 coordinator judged?

What are the biggest challenges in proposal preparation?

Which services do work?

What are the key skills of an FP7 coordinator/Project manager?

What kind of time sheets do you use at your institution?

How could EARMA help the FP7 coordinator / Project Manager ?

Any other issues?

