

THE TASKS OF A COORDINATOR

Let's allocate a few minutes for the basics:
What are the tasks of a coordinator?

Consider the Management and Coordination related work package in a project proposal, or already in the Description of Action (DoA). What tasks are listed there? Is everything mentioned? Do you know your tasks and responsibilities? Below is a list of tasks that regularly appear in the Management/Coordination work packages depending on the complexity of the project.

- Scientific coordination and
- Administrative coordination
 - Setting up an overall management structure (acting persons, responsibilities and teams).
 - Preparation of all project meetings.
 - Kick-off activities of the project and kick-off meeting (re-align vision, mission and focus on project outputs and related deliverables).
 - Generating a project management plan. The plan will describe the indicators, the reporting procedures, schedule and the management of the project progress. Monitoring accordingly.
 - Developing a quality assurance plan and monitoring deliverables/processes accordingly.
 - Risk Management and Contingency Planning.
- Legal and IPR coordination.
 - IPR Management (managing and protecting IPR linked to the results developed in the project).
 - Drafting and signing a Consortium Agreement (CA), signed before the Grant Agreement (GA)
- Financial coordination
 - Managing financial aspects, including payments, financial reporting, reallocations, and other financial activities in the project.
- Sustainability and Exploitation (if not part of another WP)
 - Analysis and actions to make the project and its infrastructure sustainable (overview of the project's sustainability scenarios;
 - Attracting stakeholders and public and private funding for the expansion of the project).

- Communication
 - Internal communication within the consortium.
 - Communication with the EC.
- Gender issues, ethical issues, social impact (horizontal issues).
- Making sure Open Access principles are followed - Data Management Plan developed for the project.
- Cooperation with other EC projects.

All these tasks are described in a short paragraph in the proposal/DoA. Make sure that all necessary tasks are noted in your project (and in your mind).

Possible deliverables of the Management/Coordination work package:

- Management tools e.g. Guidelines, Gantt chart, Deliverables and Milestone tables, reporting templates
- Quality Assurance Plan
- Gender Action Plan
- Kick-off organisation (Attendance, logistics, minutes)
- Minutes of the meetings
- Online Platform Communication tool
- 6(or 9)-monthly Interim Reports
- Partner lists and updates
- Business Plan, Exploitation Plan, etc.

Additional documents, not part of the list of deliverables but related to Management and Coordination, are:

- Consortium Agreement (should in principle be signed before the GA is signed, therefore, not needed to be included as a deliverable)
- Official EC Periodic Reports and the Final Report (some EC Project Officers request to take these out as they have to be submitted anyway)

These are the basics. Let's see what tasks are in general listed specifically for the coordinator in the DoA and the Consortium Agreement.

MAIN ROLES AND RESPONSIBILITIES OF A COORDINATOR

- Act as a SINGLE legal representative of the Consortium towards the EC and handle all communication between the EC and the consortium.
- Keep the project on track - keeping the deadlines of the deliverables and submitting them and the official reports to the EC.
- Initiate changes in work content (in line with the GA).
- Handle the advance payments and interim instalments, initiate changes or reallocation in the budget (between categories and partners and in line with the GA and CA).
- Organise and chair the review meetings if needed (decided by the EC).
- Deal with the unexpected (see example at p. 8).

The above-mentioned tasks shall not be subcontracted - only in very exceptional cases, e.g. spin-offs offices taking care of coordination activities for public bodies.

OTHER TASKS:

- Keeping the address list of members and other contact persons updated and available.
- Collecting, reviewing and submitting information on the progress of the project and reports and other deliverables (including financial statements and related certifications) to the EC.
- Initiating, preparing the meetings, proposing decisions and preparing the agenda of the meetings, chairing the meetings, preparing the minutes of the meetings and monitoring the implementation of decisions taken at the meetings.

The above require a good communication, quality assurance and monitoring system and procedures to be set up.

- Leading the negotiations and communication with the EC.
- Drafting a CA and handling all discussions around it.
- Dissemination, marketing of project results, lobbying, cooperation with external parties - as the main representative of the consortium towards the Commission, the public and the scientific community.

- Transmitting documents and information connected with the project, including all relevant communication from the EC towards the consortium.
- Administering the EU financial contribution and fulfilling the financial tasks.
- Providing, upon request, the partners with official or original copies of documents which are in the sole possession of the Coordinator when such copies or originals are necessary for the partners to present claims.

TACKLING UNEXPECTED EVENTS AND FORCE MAJEURE

A recently closed project of ours, in which we were the coordinator, involved field work for measuring and validating data. The field tasks were dependent on weather conditions and the consortium relied on a subcontractor to undertake this specific technical work. The implementation of the work was planned for the second year of the three-year project, as in the first year we would assess and calculate certain risks related to this task due to its nature. Despite the relatively wide “observation window” (i.e. optimal conditions for data recording throughout the whole spring and summer), we ended up having bad weather conditions at the planned time of the field work. Since our partner in implementation of the work was flexible enough to perform the task, we made another attempt shortly after the first one. Unfortunately, we had bad luck again with the weather, hence could not conduct the necessary work. Since we had no alternative for the task, the following year (last year of the project) the partners planned the work again. After weeks of discussions and careful investigation, we agreed on a solution to get the job done by the subcontractor. It was a scientifically and technically sound solution in line with the project’s objectives, therefore an acceptable solution for the Commission. However, just a few weeks before the field work, the subcontractor reported that they would be unable to provide the technical solution for data acquisition. Half of the optimal “observation window” had been gone by that time and we still had to perform the task, which was instrumental to the success of the whole project. We came up with a Plan A and a Plan B, and we pursued them in parallel to ensure task completion. One consisted in submitting an amendment request to the PO referring to ‘force majeure’ and asking for a one-year prolongation of the project. Plan B involved continuing to try and find a technically and operationally feasible solution and re-programme the data processing, data analysis and reporting. Finally, our fourth attempt was successful, and we obtained the necessary data to finish the research task with satisfactory results. The weather conditions were optimal, and the technical solution was serving the project’s overall needs for innovation. At the end, the prolongation was not granted for the project, so one of the plans did not work, but the new schedule for delivering the results helped us safeguard the project implementation. Lesson learned: It is always good to have alternative plans and measures in response to unexpected events and force majeure. Ideally, if you can estimate the probability of occurrence of such situations early in advance you could draft a sound risk management and response plan to minimise problems.

Is that all? Not nearly! Take a look at the everyday management items below.

EVERYDAY MANAGEMENT

- Establish effective communication (tools, channels, frequency to be decided and then regular communication maintained) e.g. Mailing lists for the project and work package teams; Skype/Online or phone conference calls for smaller discussions regularly; Face-to-face meetings to be organised cost-efficiently; Common platform for working on documents, etc.
- Manage work content changes (during the negotiation or the implementation).
- Monitor project performance - monitoring compliance by the partners with their obligations (e.g. Partner failure/work performance: inexperienced partners may act as the “weakest link”).
- Handle disagreements.
- Interpret the work content to partners if necessary.
- Control spending - budget running low or not spent (e.g. unforeseen expenditures or complaints from partners).
- Deal with extreme situations, and the unexpected e.g. Force Majeure (natural disaster, war, etc.).
- Be sensitive to cultural and gender differences.

What helps to remember all the tasks is to put them into perspective. Link the tasks with project phases; try to differentiate between pure administrative issues and major tasks, which a scientific and official coordinator of the project must perform. Here is a table showing the project lifecycle and the individual phases in this cycle to help you get started. All you need to do is to tailor it to your project.

PROJECT PHASE SPECIFIC TASKS	OFFICIAL COORDINATION TASKS, SCIENTIFIC COORDINATION	ADMINISTRATIVE MANAGEMENT TASKS	GENERAL
Grant Agreement Preparation	<p>Turning the proposal into DoA.</p> <p>Submitting all documents to the EC, signing the grant agreement (electronic).</p> <p>Drafting the CA, having it signed by all partners.</p>	<p>Preparing a tasks list on what should be done when by whom.</p> <p>Support in DoA and CA development.</p> <p>Support in filling in GAP parts, communicating with all partners.</p>	<p>Making sure all partners contribute to DoA development.</p> <p>Making sure all partners fill in the GPF, sign all documents (electronically).</p>
Starting the project	<p>Distributing advance payment according to CA.</p> <p>Organising the kick-off meeting.</p> <p>Sending out the minutes of the meeting.</p> <p>Explaining clearly the scientific scopes, technical tasks, implementation method to the partners.</p> <p>Making sure there is a Data Management Plan.</p>	<p>Explaining the communication, quality assurance, reporting responsibilities and rules.</p> <p>Developing guidelines and templates to help manage the project.</p>	<p>Kick-off meeting: setting the date, drafting the agenda, organising the meeting itself, chairing the meeting.</p> <p>Preparing the minutes.</p> <p>Setting the date for the next project meeting.</p>
Dissemination, Representation, lobbying	<p>(Re)presenting the project at events, working on the continuation of the project, discussing options with the EC. Cooperating with other projects and organisations.</p>	<p>Supporting the coordinator.</p>	<p>Ensuring high awareness, wide representation in the scientific and/or policy-making community, lobbying towards the sustainability of the project results (and/or continuation).</p>
Reporting 6-monthly internal reports suggested + official EC reports periodically (12/18 months)	<p>Checking the submitted deliverables, activity and financial reports. Uploading all relevant information to the PP and submitting to the EC.</p> <p>Distributing the instalments once received from EC.</p>	<p>Sending warnings about reporting/delivery deadlines.</p> <p>Sending detailed instructions.</p> <p>Cross-checking the submitted reports, noting errors, etc.</p>	<p>Making sure that all partners deliver in time and quality.</p> <p>Controlling budget spending (6-monthly) and adapting as needed.</p>

<p>Project meetings</p>	<p>Initiating the meetings, Sending out the agenda, and then the minutes of the meeting. Making sure that all results and progress is known by all. Explaining clearly the upcoming tasks.</p>	<p>Drafting the agenda, chairing the meeting together with the organiser and the coordinator.</p>	<p>Making the partners active during the meeting. Setting the date for the next meeting. Preparing the minutes.</p>
<p>Review (EC monitoring) Mostly technical/ scientific, but could be financially focused on the whole project</p>	<p>Organising pre-review meeting for the partners. Sending all the due deliverables and the draft report to reviewers. Introducing the project at the review.</p>	<p>Providing support to partners (what are the rules, how to get prepared, etc.).</p>	<p>Preparing the consortium for scheduled or random reviews, Developing the draft report.</p>
<p>Closure of the project</p>	<p>Organising the final meeting focusing on project closure and continuation of collaboration. Communicating with the partners - proper farewell. Distributing the final payment. Submitting the report on the distribution of EU contribution.</p>	<p>Final administrative steps, informing all partners about their final duties.</p>	<p>Making sure that all public results are available, Website maintenance is ensured for 5 extra years. All is archived, administered.</p>
<p>IPR, Gender, Ethical issues</p>	<p>All horizontal issues must be considered. IPR is handled in the CA; still, additional tasks are needed to be handled if IPR-linked results are developed in the project. Gender issues must be reported if relevant they are considered relevant by the EC in most projects. Ethical issues might not come up, but if they do, the Coordinator has to make sure that they are duly managed.</p>		
<p>Managing partners Management system</p>	<p>Supporting less experienced partners; answering questions; handling non-performance; Making sure that the management system is set up - all decision-making bodies have appointed representatives; Initiating decision-making processes when needed by the relevant boards.</p>		

EVERYDAY MANAGEMENT	OFFICIAL COORDINATION TASKS, SCIENTIFIC COORDINATION	ADMINISTRATIVE MANAGEMENT TASKS	GENERAL
Communication	Setting up a communication system.	Suggesting the communication channels, tools, their appropriate use, etc. Reminding about the deadlines.	Regular communication - scientific, administrative, financial.
Monitoring of progress, quality	Setting up a monitoring and quality control system - both Scientific and Financial	Suggesting steps and methods in monitoring and quality control and administering the activities.	Making sure that monitoring is done - both scientific and financial.
Administration, archiving	Ensuring internal archiving.	Administering what should be saved and archived, and what took place when in the project.	Saving all documents, results, deliverables, saving all communication with the partners and the EC printed or electronically.
Managing unexpected events	Communicating with the EC and the partners. Safeguarding the interest of the project.	Supporting the coordinator (rules, options, etc.).	Dealing with problems: withdrawal of a partner, a new scientific trend or legal change to adapt to, force majeure, etc.
Working with the EC project officer	Keeping the deadlines, answering his/her e-mails. Communicating the messages of the consortium. Discussing changes and modifications.	Checking deadlines. Ensuring regular communication.	Getting to know the officer, his/her interests and demands regarding the project.
Managing disputes	Mediation, finding a compromise - safeguarding the interest of the project.	Explaining the rules, options and mediation.	Acting according to CA, mediating between the partners.

Grant Agreement modification	Initiating work content changes and discussing this with the EC.	Explaining the process, providing relevant templates.	Coordinating with partners the modifications, developing the new DoA if relevant.
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SKILLS OF A COORDINATOR

What skills does a coordinator need to have to be able to successfully coordinate a project?

- **Scientific/technical skills** - to be able to understand the project objectives, potential for innovation and technical risks.
- **Administrative/financial skills** - a general knowledge on the administrative and financial (legal) rules of the funding programme.
- **Social skills** - excellent ability to control and motivate the partners, including self-confidence and power: The Coordinator is always “More equal than the others”
- **Leadership skills** - project coordination is not a democracy, but also not a dictatorship!

THE IMPORTANCE OF SOCIAL SKILLS IN PROJECT COORDINATION

In an ongoing project of ours, there were some changes in personnel at one of the key partners. The newly appointed project manager had good knowledge on how to handle things at a local level but lacked the same know-how in a European context, which he tried to compensate by addressing us with frequent phone calls sometimes lasting up to 30 minutes. Much patience had been mobilised during these calls, while our input made him realise slowly but steadily the main principles along which he needed to act. Cutting corners early on by not giving him enough time to explain himself, his needs and ways of doing things might have proved counterproductive in the long run, because of the distrust this may have developed for him towards us, the coordinator. Now being confident of what was expected from him and seeing his role within the whole of the project, he started to realise how his immediate co-workers at the project partner institution “suffered” from the same way of thinking he used to abuse us with for a while. Our great deal of patience and efforts to understand his ways invested in him eventually paid off, and now we have a very efficiently operating local manager fully capable of handling most of his tasks on his own and requiring our assistance only once in a while. Remember; patience is of key importance when it comes to dealing with your partners! And patiently supporting your partners and “training” them pays off in the medium-/long-term.

If you do not have all these skills, set up a team, which would collectively have these skills. You may find the right people within your organisation or within the core project team (most crucial partners).

What are the tools you have in hand?

- ALWAYS use your **charm!**
- Be pragmatic!
- Sense of **politics** - Diplomatic skills may come very handy.
- Use your **legal power**: Management Bodies - Consortium Agreement

Start with your charm and use legal powers only when absolutely necessary!