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D3.1 Mid-term report
on research management and administration training

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Abstract:

This deliverable provides an overview of the presentations delivered within Work Package 3 of the WideHealth project.
The document highlights the methodology adopted for structuring the activities and presents the status of the training delivered in the first year of the project and the related Table of Contents. In addition, it defines the next steps for the training that will be delivered in the upcoming months of the project.

Keyword list: research management, training, seminars.

Document History

Version	Date	Author (Unit)	Description
0.1	20.11.2021	Sara Testa (FBK)	Initial planned content and structure
0.2	25.11.2021	Sara Testa (FBK), Paola Tessari (FBK)	Added first round of content
0.3	01.12.2021	Sara Testa (FBK), Paola Tessari (FBK)	Content finalisation
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1.0	06.12.2021	Sara Testa (FBK)	Document finalisation
1.1	17.12.2021	Sara Testa (FBK)	Inclusion of reviewers' feedback and addition of section 1.1

Table of Contents

Abbreviations

D	Deliverable
FBK	Fondazione Bruno Kessler
T	Task
UKIM	Ss. Cyril and Methodius University in Skopje

List of figures

List of tables

1   Introduction

This deliverable is related to the content produced within Work Package 3 of the WideHealth project; in particular, it aims at providing an overview of the material produced for the training in WP3 and of the status of the training delivered.

The organisation of the activities in WP3 has followed a methodology that is detailed in Section 2 of the present document. Work Package 3 is divided into four main tasks, each of them representing a topic: the first step is related to the definition of the content categories that could be presented by starting with an analysis of the four tasks. The second step is the definition of the presentations to be delivered within the first year of the project: these have been prioritised following the need of the Widening partners, mainly the Coordinator UKIM. The third and fourth steps are related respectively to the approach adopted for presenting the content in order to make the presentations more engaging and to the assessment of the meetings from different points of view (clarity, pertinence, etc.).

Then, the document presents the status of the training delivered up to Month 12 of the project, namely the main contents presented to that point of time to the Consortium.

In conclusion, the deliverable presents the next steps related to this activity.

This deliverable summarises the activities conducted in WP3 to this point of time, while the complete description of the specific activities will be further detailed in D3.2, D3.3, D3.4, and D3.5 which will present the material produced for each task of this Work Package.

1.1 Relation to other WPs

This deliverable is linked with the following WPs as specified in Table 1 below.

Table 1 Overview of the relation to other WPs

Work Package	Relationship
WP1	As detailed in the methodology, this deliverable has cooperated with the coordinator for the definition of content that are useful to improve the Widening partners' competences on EU project management. In addition, in relation with Task 1 .5 Dissemination & Communication, it will be evaluated whether the material produced could be publicly disseminated and exploited.
WP2	The WP leaders will cooperate to define possible topics to address that might be useful for the student exchanges (e.g. data management).

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WP4	The WP leader has aligned the scheduling of the presentation with WP4 leader to avoid overlapping of events. Furthermore, the activities delivered within WP3 will be also part of the schools organised within this Work Package.
WP5	One of the outputs of WP5 is the definition of joint project proposals: because of this, WP3 has focused on the presentation of Horizon Europe structure to facilitate the process of finding opportunities to exploit together.

2 Methodology

This section describes the methodology that was used for the definition of the topics to present and for the definition of the way to deliver the content produced. The methodology is divided into four steps:

1. Overall Content Definition
2. First Year Training Scheduling
3. Content Delivery
4. Content Evaluation

2.1 Overall Content Definition

This deliverable refers to the four tasks in Work Package 3 of the Wide Health Project, namely:

- T3.1 Research management and administration training
- T3.2 Ethics, data management and the legal framework training
- T3.3 EU project administration and financial management training
- T3.4 Research exploitation training

The first step of the methodology has been the definition of possible contents to develop for each of the tasks, which is detailed in Table 1 below. For each task, a list of subtopics and the related possible training contents were defined: the foreseen tasks have the potential for numerous presentations and activities, and it was decided to include them all in this list to have a wider range of possibilities to choose from. The ultimate selection of the training topics to be presented during the project lifetime was done following a prioritisation of the needs according to the available resources and is further described in the following steps of the methodology.

Table 2. Content definition

Topic	Sub-topic	Content
T3.1 Research Mgmt & Admin	Research Excellence	o Soft Skills for group management o Smart allocation of human resources o Strategic definition of the research group o Positioning towards the State of the Art
T3.1 Research Mgmt & Admin	Marketing & Dissemination	o Identification of the best channels for marketing the research group (e.g. strategic events, production of demos, etc.) o Scientific dissemination of outcomes (target journals and conferences, H-index, Impact Factor, etc., Editor's business models, Licencing, etc.) o Open Science (Open Access Publications, Open Data, FAIR Data, etc.)

T3.1 Research Mgmt & Admin	Networks & Partnership	o Identification of relevant communities and networks for establishing strategic long-term alliances
T3.1 Research Mgmt & Admin	Funding Impact	o Funding opportunities identification (national, international, Marie Curie fellowship, etc.) o Research sustainability (definition of a business model canvas)
T3.2 Ethical & Data Mgmt	Ethics	o Legal framework within Pervasive Health domain o In-depth analysis of ethical issues (GDPR, Ethical protocol for pre-clinical experimentation, Ethical committee procedures, Gender balance, etc)
T3.2 Ethical & Data Mgmt	Open Science	o Open Science - an umbrella concept o Open Data
T3.2 Ethical & Data Mgmt	Data Management	o Research Data Management – why o Data dissemination or exploitation o Data life cycle o FAIR principles o Data Management Plan

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T3.3 EU Project	Proposal Preparation	o Brief introduction on EU institution, policy and programmes
		o Funding Programmes (H2020 - Horizon Europe, Interreg, etc.)
		o Finding the right call (type of HE calls - CSA, RIA, IA, PCP, PPI; Work Programme; create a project proposal idea based on the call, newsletters to be updated on calls, CORDIS, etc.)
		o Finding the right partners (networking events, etc.)
		o ECAS – The funding & Tender Portal (proposal set up)
		o RIA/IA/CSA proposal structure (1-6 sections)
		o WPs / Tasks / deliverables / milestones / Gantt / Pert / Work Breakdown Structure
		o Transversal WPs:
		   · Management
		   · Dissemination & Exploitation
		o Proposal Coordination – main tasks (Partner profile, effort allocation à budget, strategies, timeline, etc.)
		o *LIVE LABORATORY on proposal idea definition*
		o National Contact Point

T3.3 EU Project	Project Implementation – Preparatory activities	o Beneficiary's Roles (PLSIGN, FSIGN, etc.) o Declaration of Honour o Grant Agreement Preparation o GA signature o Accession Form o Consortium Agreement o SyGMa

T3.3 EU Project	Project Implementation	- European Project Management · Project Cycle Management (PCM) · Goal Oriented Project Planning (GOOP) · Logical Framework Matrix (LogFrame) - Kick-off meeting preparation - Timely management of tasks and deliverables - Continuous Reporting (deliverables, milestones, etc.) - Periodic reporting (technical – part A and part B – and financial) + Final reports - Keeping records (after the project) - Conflict resolution - Relationship with the EC - Focus: Erasmus+ Programme
T3.4 Research Exploitation	IPR	- What is IP – why is needed - Copyrights, trademarks, patents - Choosing the best tool for each situation - IP in H2020 (in preparation phase, GAP, project implementation and after) - Access Rights
Research Exploitation	Exploitation Plan	- Identification of exploitable outputs - Social and commercial impact - Identification of revenue streams (market analysis, deployment of evidence, deployment plan, potential uptakes)

2.2 First Year Training Scheduling

In the first months of the project, a draft calendar for the presentations to be held in 2021 was defined. As the overall goal of the work package is to bridge the gap of widening countries with regard to the management of both research-related activities and project administration, the planning of this first mid-term has focused on the needs identified by the project coordinator, UKIM. These were collected during calls and emails exchanged between FBK and UKIM teams.

In addition, the definition of the material to present first also took into account that some contents are more suitable for being presented in the form of a seminar, while others more in forms of a workshop or a hand-on training activity.

The prioritisation of the training topics was conducted after the analysis of the needs conducted internally by the Project coordinator at UKIM: as a result, it was decided that the main topics to be covered during the first year should be related to the following:

- **Proposal Preparation** → this aimed at presenting the novel Horizon Europe programme in order to support the achievement of the project KPIs foreseen in WP5 (i.e. Write EU proposals, KPI = at least 3 joint proposals)
- **Project Implementation** → this topic was presented to support UKIM and other partners to be prepared for the management of the WideHealth project from a financial and administrative point of view.

2.3   Content Delivery

The content delivery was agreed between trainers (FBK) and trainees (UKIM) to be conducted as interactive sessions in which training materials were presented as standard frontal lectures (in these cases online). It was also agreed that this delivery method could be modified eventually in the case of future face to face training sessions that could be potentially changed to other methods such as a collaborative PBL (Problem Based Learning) approach. For the lectures conducted in the first reporting period, PowerPoint presentations were prepared for both the seminars and the workshop implementation (see section 3 for the description of the meetings organised). In most cases, the preparation of the material included the presentation of the main concepts as well as demonstrations (e.g. showing the European Commission Funding & Tender portal) and exercises. For example, in the Financial Management presentation, some practical exercises were prepared to help the audience assimilate the concepts.

Figure 1. A practical example: calculating personnel cost

Figure 2. Doing the exercise step by step

In order make the presentations more interactive and engaging, it was decided to use the Mentimer platform[1] for: i) knowing the audience background and profile (researcher, project manager, etc.), ii) understanding the audience knowledge on the topic presented, iii) asking questions related to the content presented, and iv) helping the audience understand some concepts by applying them in practice. For example, in the presentation related to Project reporting, 10 questions were prepared, such as the one below.

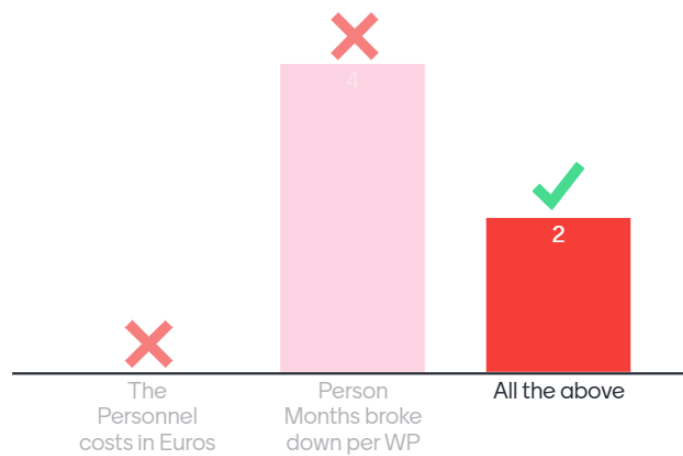Figure 3. An example of a Mentimeter question

2.4 Evaluation

As part of the methodology, an evaluation form has been prepared with Google forms, to be circulated to the participants in order to collect their feedback about the presentations, the usefulness of the content, and the clarity. The Evaluation forms questionnaires is visible in the screenshots below:

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[1] https://www.mentimeter.com/

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How would you rate the topics? *

	1	2	3	4	5	
Not useful	○	○	○	○	○	Very useful

I will be able to use what I have learned in this event into my everyday activities. *

	1	2	3	4	5	
Strongly Disagree	○	○	○	○	○	Strongly Agree

The contents were presented in a clear way. *

	1	2	3	4	5	
Strongly Disagree	○	○	○	○	○	Strongly Agree

Please rate your overall opinion of the presentation: *

	1	2	3	4	5	
Not Satisfied	○	○	○	○	○	Very Satisfied

The contents were: *

☐ Easy

☐ Adequate

☐ Difficult

Thank you for your feedback, any advice you might have is very welcome!

Long answer text
....

Figure 4. The Google Form for evaluation

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3 Status of training delivered

In accordance with FBK trainers and the Coordinator UKIM, a calendar for the delivery of training was agreed to achieve the delivery of the first four modules by the deadline of the first reporting period. Each presentation lasted between one hour and one hour and a half. The session was structured to allow participants to intervene with comments and questions during a dedicated session at the end of the seminar, but also during the presentation itself. The four modules have been delivered over the following dates:

1. 28/4/2021 Funding programmes and proposal submission - 9 participants

2. 27/5/2021 Financial Management - 14 participants

3. 15/10/2021 Project Reporting - 9 participants

4. 4/11/2021 Deliverable writing - 12 participants

After the conclusion of the training sessions, an evaluation form previously prepared with Google Forms, was circulated to the participants in order to collect their feedback about the presentations, the usefulness of the content, and the clarity. Overall, the topics of the sessions were evaluated as very useful and the majority of participants declared that they will be able to use the content in their daily work, especially in relation to the training on Financial Management, with up to 90% of positive responses. The Project reporting presentation reported a slightly different evaluation, with a fully positive evaluation by about 70% of attendees. The contents were generally evaluated as adequate and easy, and the majority of attendees declared to be very satisfied with the presentations given. The feedback collected so far will help the design of the future training activities and their further improvement for the training planned in the next months of WideHealth Project.

4 Material produced

The Lead beneficiary of the Work Package has produced a series of presentations that provided the core of the training material for Task 3.3. The presentations title and content are the following:

1. Funding programmes and proposal submission. This focussed on the Funding Programmes of the EU, focussing on Horizon Europe, its objectives, missions and provided some guidelines for setting up a proposal.

2. Financial Management. This seminar provided an illustration on the project budget in its main elements (eligible costs, costs categories, timesheet and records keeping).

3. Project Reporting. This presentation addressed the two types of reporting, Technical and Financial, with practical examples on how to prepare the reporting through the EC Portal and explanation about the roles involved.

4. Deliverable writing. The last presentation was an overview about the different types of deliverables that can be present in a project and included a dedicated conclusive part with a 'hands-on' session where the participants were asked to draft a possible table of content of one WideHealth's deliverables.

The produced material is available to the participants in the form of PowerPoint presentations uploaded on the Project's shared folder. In addition, the sessions were recorded, and the videos are available on the Project's shared folder. To all the material produced a Creative common license (CC BY) is attributed. This is a licence which allows the use of the work *"under the condition that the user must attribute the work in the manner specified by the author or licensor"*.[2]

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[2] https://wellcome.org/grant-funding/guidance/open-access-guidance/creative-commons-attribution-licence-cc

5 Next Steps

In the upcoming months and by the end of the project, there will be different forms of presentation that will cover all the tasks listed in Table 1.

The scheduling of the presentation will also take into account the three summer and winter schools: for these events, the topics will be selected based on the target audience that will be attending the training, on the overall topic of the school, and on the possibility of having a face-to-face interaction. For example, the winter school foreseen in February 2022 in North Macedonia, will engage mainly UKIM students: because of this, it was suggested the topic of Open Science and Open Data, which would potentially interest a large student audience and might include more interactive sessions.

Another topic that will be addressed in the first months of 2022 is related to Research Management. In this regard, it is envisioned to organise a session involving the WideHealth partner Institutions to share their approach and lessons learnt on research management as an exchange of best practices on conducting pervasive health sustainable research.

6 Conclusions

This document is the first deliverable of Work Package 3 of the WideHealth project, whose aim is to bridge the gap of widening countries with regard to the management of both research-related activities and project administration. The document presents the methodology designed and implemented in order to reach this goal, and the status of the training delivered. In general, the presentations delivered so far covered topics that are useful to most of the attendees in their daily work.

The training plan in the upcoming months will mainly focus on tasks T3.1, T3.2, and T3.4, which were less prioritised in terms of content delivery in this first year of the project; based on the Consortium needs, other sessions will be delivered within T3.3, especially to provide support for the first project reporting phase.