MSCA IF PROPOSAL PART B: IMPLEMENTATION
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MSCA IF APPLICATION
PART B

Two separate PDF documents:

Document 1 – max 10 p

1. EXCELLENCE: research, training, supervision, researcher
2. IMPACT: impact on career, dissemination, communication
3. IMPLEMENTATION: work plan, resources, management

Document 2 – no overall page limit

4. CV OF THE EXPERIENCED RESEARCHER: max 5 p
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS: 1 p overall + max 1 p per organisation
6. ETHICAL ASPECTS: no limit, based on ethics table in Part A
7. LETTER OF COMMITMENT OF PARTNER ORGANISATION (GF ONLY): signed and scanned letter from organisation outside Europe

http://ec.europa.eu/research/participants/data/ref/h2020/call_ptef/pt/2018-2020/h2020-call-pt-msca-if-2018-20_en.pdf

SOURCES OF INFORMATION I
OFFICIAL MATERIALS

- The **Guide for Applicants**: http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-if-2018-20_en.pdf

- **Work Programme**: http://ec.europa.eu/research/participants/data/ref/h2020/wp/2018-2020/main/h2020-wp1820-msca_en.pdf

- **Horizon 2020 On-line Manual**: http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm

  - Application process
  - Links to general Horizon 2020 guidelines on horizontal issues, such as ethics, open access/open data, gender aspects in research, etc.
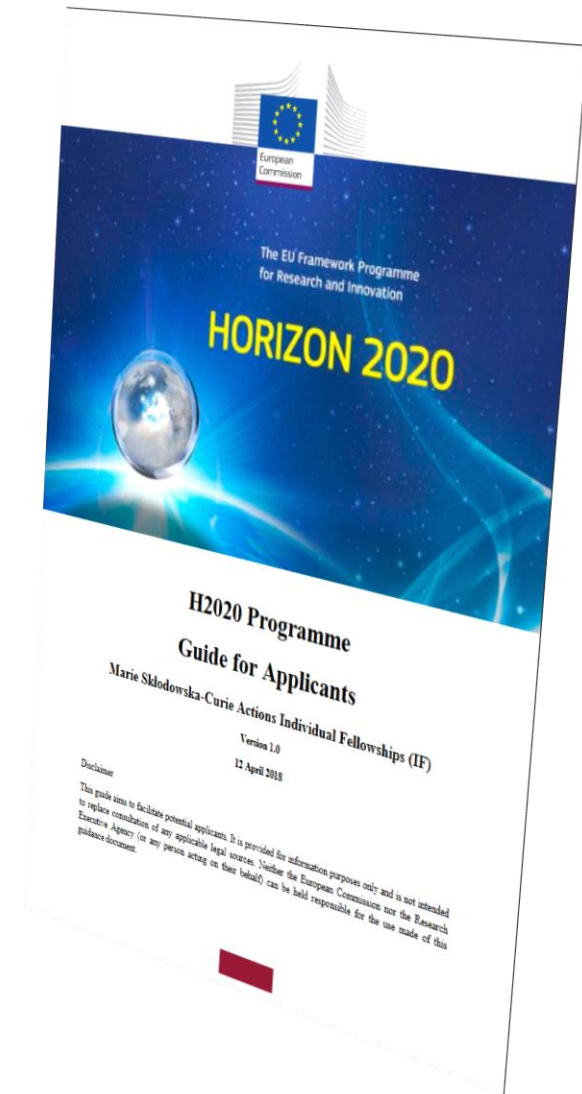
SOURCES OF INFORMATION II
## USEFUL MATERIALS

- MSCA IF evaluators' guidelines (2018):
  https://ec.europa.eu/info/sites/info/files/msca_if_2018_manual_for_evaluators_0.pdf

- Evaluators' briefing– videos (H2020 general):
  https://ec.europa.eu/info/briefings-horizon-2020-independent-experts_en

- MSCA NCP project Net4Mobility+ materials:
  https://www.net4mobilityplus.eu/scientific-community/
  - **Handbook**; flyers; success stories; videos; FAQ; statistics; Expressions of Interest

IMPLEMENTATION

MSCA IF EVALUATION CRITERIA
3 - IMPLEMENTATION

- Coherence and effectiveness of the **work plan**, including the appropriateness of the allocation of tasks and resources

- Appropriateness of the **management** structure and procedures, including risk management

- Appropriateness of the institutional environment (**infrastructure**)

- 20% of the final score

Excellence

Impact
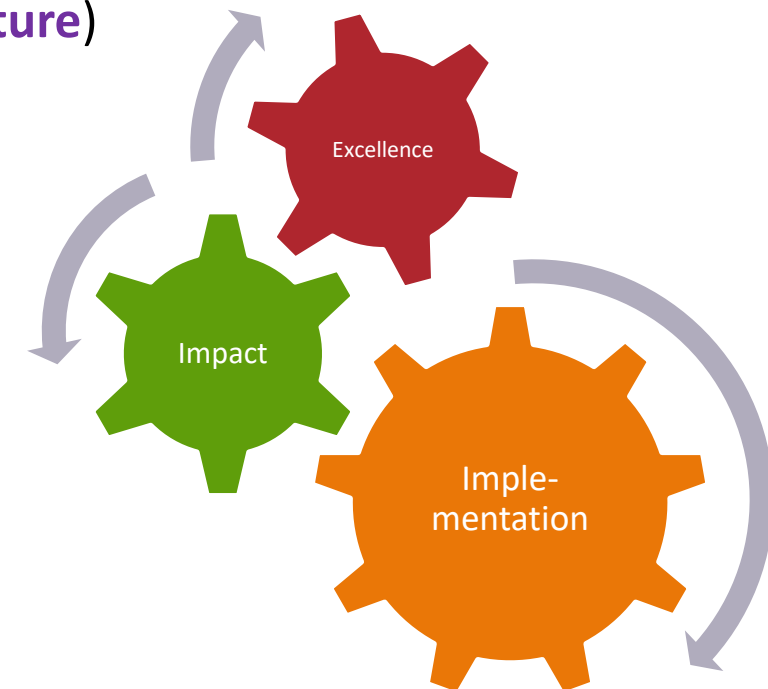
Imple-mentation

MSCA IF PART B TEMPLATE
IMPLEMENTATION

3. Implementation

3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

3.2 Appropriateness of the management structure and procedures, including risk management

3.3 Appropriateness of the institutional environment (infrastructure)

Part B-2 Section 5 - Capacity of the Participating Organisations

IMPLEMENTATION
3.1 WORK PLAN, INCLUDING ALLOCATION OF TASKS AND RESOURCES

- Describe how the work planning (including deliverables and milestones) and the resources mobilised will ensure that the research and training objectives will be reached. Explain why the number of person-months planned and requested for the researcher (and corresponding to the project duration) is appropriate in relation to the proposed activities.

- Additionally, a Gantt chart must be included in the text listing the following:
  - Work Packages titles (there should be at least 1 WP),
  - Indication of major deliverables, if applicable,
  - Indication of major milestones, if applicable,
  - Secondments, if applicable,
  - Planning for dissemination, exploitation and communication activities (unless included in a dedicated WP).

WORK PLAN

Describes concrete steps to achieve the objectives, incl for project management, and methods for monitoring progress

Work plan

Work Package 1

Work Package 2

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Objective

Task

Deliverable
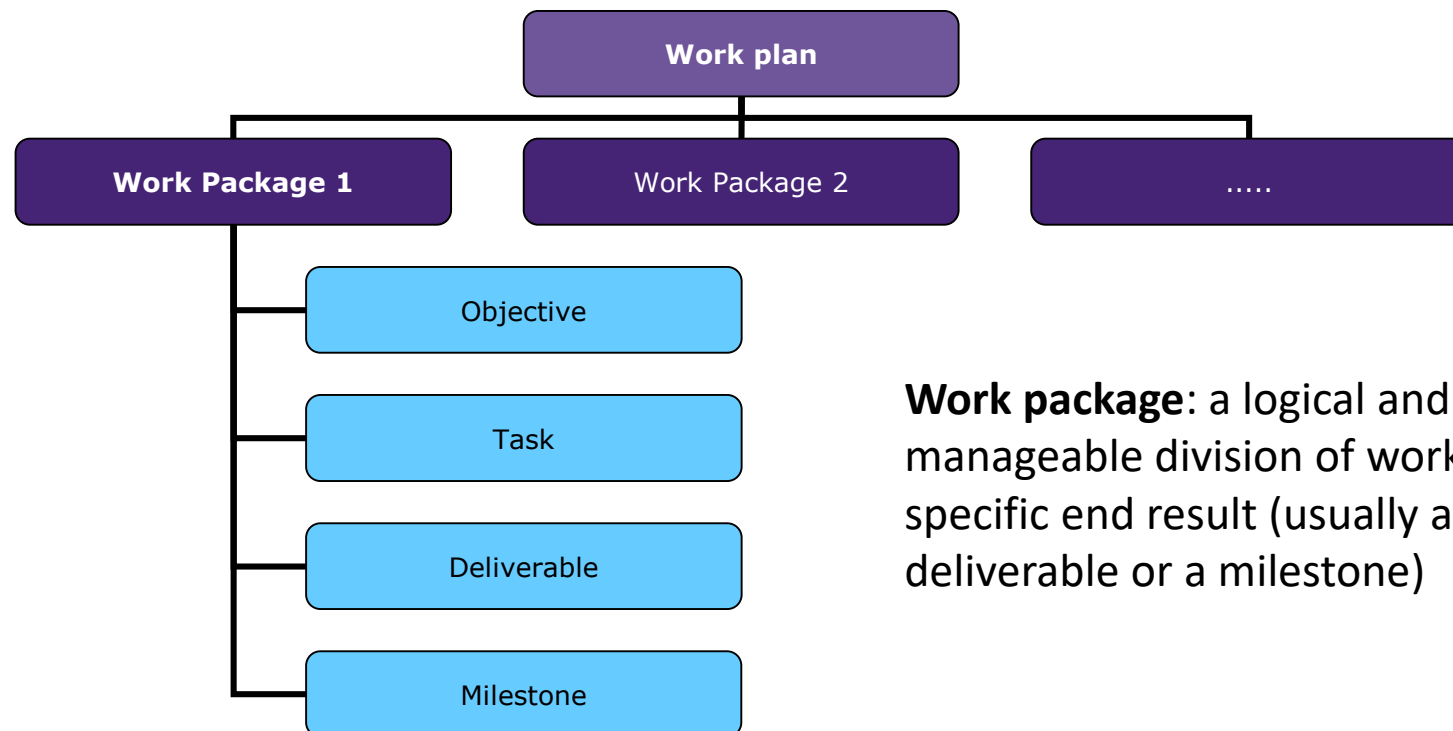
Milestone

Work package: a logical and manageable division of work with a specific end result (usually a deliverable or a milestone)

S	**M**	**A**	**R**	**T**
Specific	**Measurable**	**Attainable**	**Relevant**	**Time-Bound**
Make sure your goals are focused and identify a tangible outcome. Without the specifics, your goal runs the risk of being too vague to achieve. Being more specific helps you identify what you want to achieve. You should also identify what resources you are going to leverage to achieve success.	You should have some clear definition of success. This will help you to evaluate achievement and also progress. This component often answers how much or how many and highlights how you'll know you achieved your goal.	Your goal should be challenging, but still reasonable to achieve. Reflecting on this component can reveal any potential barriers that you may need to overcome to realize success. Outline the steps you're planning to take to achieve your goal.	This is about getting real with yourself and ensuring what you're trying to achieve is worthwhile to you. Determining if this is aligned to your values and if it is a priority focus for you. This helps you answer the why.	Every goal needs a target date, something that motivates you to really apply the focus and discipline necessary to achieve it. This answers when. It's important to set a realistic time frame to achieve your goal to ensure you don't get discouraged.

GANTT (1)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
WP1 - Elaboration of theoretical framework																								
Materials collected		MS1																						
Analysis completed				MS2																				
Article finalised						D1																		
WP2 - Collecting and analysing empirical data																								
Questionnaire composed					MS3																			
Data collected											MS4													
Analysis completed															MS5									
Article finalised															D2.1									
WP3 - Binding empirical data with theoretical materials and the case law																								
Proposal completed																								MS6
Report completed																								D3.2
WP4 - Dissemination and communication																								
Conference activities															D2.2									D3.1
Notifying relevant institutions about planned activities; sending them results of the researh																								
Intordusing the project in the Netherlands																								
Introducing the project in Estonia																								
Administation of the webpage																								
WP5 - Key meetings with the supervisor for progress monitoring and risk managment																								

MS = Milestone; D = Deliverable

GANTT (2)

analyses completed / *MS2.4.* Additional field work season completed (see 3.2.2 *Risk Management*) *D2.1.* Data analysed and article finalised

WP 3. Genetics of urbanization: an experiment with Estonian great tits

MS3.1. Preparations for field work completed / *MS3.2.* Field work completed / *MS3.3.* Laboratory analyses completed *D3.1.* Data analysed and article finalised

WP 4. Dissemination and commmunication

MS 4.1. Bird behaviour blog started / *D 4.1.abc* Conference participations / *D4.2* Seminar for UT students held

Outgoing	1	2	3	4	5	6	7-9	10	11	12	13	14	15-17	18	19-22	23	24
WP 1.			MS 1.1		MS 1.2			D 1.1									
WP 2.						MS 2.1				MS 2.2				MS 2.3		MS 2.4	D 2.1
WP 4.			MS 4.1					D 4.1a								D 4.1b	

Return	25	26	27	28		30	31	32	33	34	35	36
WP 3.		MS 3.1				MS 3.2				MS 3.3		D 3.1
WP 4.								D 4.1c				D 4.2

Figure 1. Gantt chart of the project.
WP – work package
D – deliverable,
MS - milestone

3.2 Appropriateness of the management structure and procedures

3.2.1 Project organisation and management structure

The Grant Agreement concluded between Research Executive Agency (REA) and host organisation will be administrated by the Office of Research and Development (ORD) of the UT. Prof. Mänd will be appointed by UT as the supervisor of the project and he will be the main contact for the REA. Before the start of the fellowship an

ALLOCATION OF RESOURCES

WORKING TIME

- Person-month: 1 person working full-time for 1 month
- In this project, you have 24 (or 36, or another number = length of your project) person-months
- How much of your working time will you spend on each WP? (rough estimate)

MONEY

- In this project you have a fixed budget of 800 x 24 (or 36, or another number) = 19 200 €
- Is it sufficient for your activities?
- If not, where will the rest come from?

IMPLEMENTATION
3.2 MANAGEMENT STRUCTURE AND PROCEDURES, INCLUDING RISK MANAGEMENT

- Describe the organisation and ==management structure==, as well as the ==progress monitoring== mechanisms put in place, to ensure that objectives are reached. Discuss the research and/or administrative ==risks== that might endanger reaching the action objectives and the contingency plans to be put in place should risks occur.

- *If applicable, discuss any involvement of an entity with a capital or legal link to the beneficiary (in particular, the name of the entity, type of link with the beneficiary and tasks to be carried out).*

- If applicable, please indicate here information on the ==support services== provided by the host institution (European offices, HR services…).
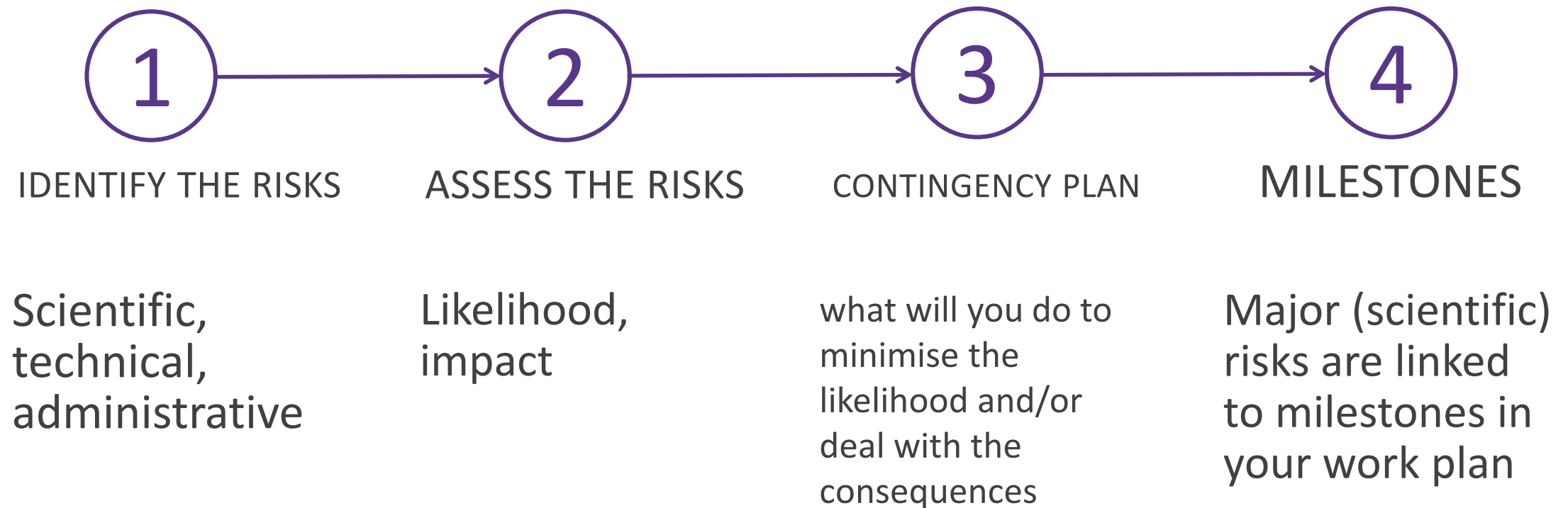
PROJECT MANAGEMENT PROGRESS MONITORING

Project management:

- Who takes decisions?

- How often management meetings take place?

- Who will help with finances, reporting, etc.? (support services)

- What are the common procedures of project management in the Host Organisation?

Progress monitoring:

- Who will monitor progress of the project? How and how often?

- What are the common procedures in the Host Organisation?

RISK ANALYSIS

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1 → **2** → **3** → **4**

IDENTIFY THE RISKS   ASSESS THE RISKS   CONTINGENCY PLAN   MILESTONES

Scientific, technical, administrative

Likelihood, impact

what will you do to minimise the likelihood and/or deal with the consequences

Major (scientific) risks are linked to milestones in your work plan

IMPLEMENTATION - EVALUATION

IMPLEMENTATION SUB-CRITERIA	WHAT TO EVALUATE
3.1 **COHERENCE AND EFFECTIVENESS OF THE WORK PLAN, INCLUDING THE APPROPRIATENESS OF THE ALLOCATION OF TASKS AND RESOURCES**	➹ Assess how the work planning and the resources mobilised will ensure that the research and training objectives will be reached. ➹ Assess why the number of person-months planned and requested for the project is appropriate in relation to the proposed activities. ➹ A Gantt chart should be included. Please assess: ☑ Work package titles (there should be at least one WP) ☑ List of major deliverables, if applicable ☑ List of major milestones, if applicable ☑ Secondments, if applicable
3.2 **APPROPRIATENESS OF THE MANAGEMENT STRUCTURE AND PROCEDURES, INCLUDING RISK MANAGEMENT**	➹ Assess the organisation and management structure, as well as the progress-monitoring mechanisms in place, to ensure that the objectives are reached ➹ The research and/or administrative risks that might endanger reaching the project objectives, and the contingency plans to be put in place should such risks occur

IMPLEMENTATION - EVALUATION

STRENGTHS

- The scientific work plan is properly divided into three WPs dedicated to achieve each of the objectives of the research project. Gantt chart includes WPs, milestones and deliverables, assigning a number of months that is credible for the success of the proposal.
- The host group will mobilise all the necessary operational resources to achieve the goals of the project, including appropriate personnel to provide necessary training of the researcher.
- Dissemination, communication, and exploitation activities are regularly scheduled in the work plan and clearly presented in the Gantt Chart.
- A detailed plan to monitor the project from different angles has been put in place to guarantee reaching the proposal objectives.
- The proposed risk management is appropriate and effective. All major risks have been identified, their impact on the project is clearly articulated and relevant contingency measures are proposed, in particular, for the low probability but impactful technical risks.

WEAKNESSES

- The schedule is very dense and overly ambitious for the proposal time frame, in particular regarding the quantity and variety of data planned for analysis, as well as the number of planned publications and their schedule.
- The work plan is inadequately presented. It is very generic, incomplete and it does not include an adequate description of the activities to be undertaken.
- Allocation of time and resources to various tasks is not explained in sufficient detail. Some of the milestones and deliverables included in the work plan are poorly defined.
- The number of person-month for the different work packages or activities is not clearly indicated; therefore, it is difficult to assess the appropriateness of the effort in relation to the ambitious proposed activities

IMPLEMENTATION
3.3 INSTITUTIONAL ENVIRONMENT (INFRASTRUCTURE)

- The active ==contribution of the beneficiary== to the research and training activities should be described. For Global Fellowships, the role of the partner organisations in Third Countries for the outgoing phase should also be provided.

- Describe the ==main tasks== and commitments of the ==beneficiary== and all ==partner organisations== (if applicable).

- Describe the ==infrastructure, logistics, and facilities== offered insofar as they are necessary for the good implementation of the action.

B2 SEC 5
CAPACITY OF THE PARTICIPATING ORGANISATIONS

General description	Academic organisation	Role and profile of key persons (supervisor)	Dept./ Division / Laboratory	Key research facilities, Infrastructure and Equipment	Independent research premises?	Previous and current involvement in research and training programmes	Relevant publications and/or research/ innovation products
Organisation as a whole + Dept.	Yes / No	Name, title, qualifications	Indicate name	List of equipment / facilities needed for your project	Yes / No - If No, explain	List of **5** relevant projects	List of **5** relevant publications (co-)authored by supervisor

IMPLEMENTATION - EVALUATION

3.3 APPROPRIATENESS OF THE INSTITUTIONAL ENVIRONMENT (INFRASTRUCTURE)	➤ The beneficiary's active contribution to the research and training activities ➤ The main tasks and commitments of the beneficiary and partners (if applicable) ➤ The infrastructure, logistics and facilities offered in as far they are necessary for the good implementation of the project ➤ For Global Fellowships ONLY:, also consider the partner organisation in third countries for the outgoing phase.

IMPLEMENTATION - EVALUATION

STRENGTHS

- The host institution's active commitment to the implementation of the project is demonstrated by making available to the researcher various training activities and supporting services.
- The active contribution of the host institution to training and research activities has been very well justified. The proposal shows perfectly that the host institution would put its excellent laboratories and infrastructure at the researcher's total disposition for the execution of the project.
- The beneficiary's contribution to the project is very well demonstrated, support in creating a data management plan and help with dissemination and communication activities will be provided.
- The proposal fully demonstrates the appropriateness and the infrastructure of the host institution. The host institution has an excellent track record, and it is internationally recognized, also partially due to the resources at its disposition. These resources will be available to the researcher, thereby strengthening the chances that the project's objectives will be achieved. The host institution's active contribution to the research and the training activities is evident.

WEAKNESSES

- Commitment of key personnel from host and partners on research and training is not clearly specified. Resources are not quantified for the support and mentoring staff at the host.
- The availability of the facilities necessary to cover the microbiology and biotechnological engineering aspects of the proposal is not sufficiently considered.
- The proposal does not sufficiently address the issues related to the overall practical arrangements related to the field trips.
- The specific office facilities and logistical support to be made available to the researcher at the host institution are not fully described.

APPROPRIATENESS OF
INSTITUTIONAL ENVIRONMENT

Uni X provides a high-class environment for research. The central location in City Y is convenient for conducting the interviews, as City Y is both administrative and business centre of Country Z. Uni X's research staff is also extremely well networked internationally . The same applies also to Uni A in Country B. Both of the universities have also access to all relevant scientific databases, in addition to extensive libraries. Generally, Country Z academics are highly satisfied with their workplaces.

How would you improve this text?
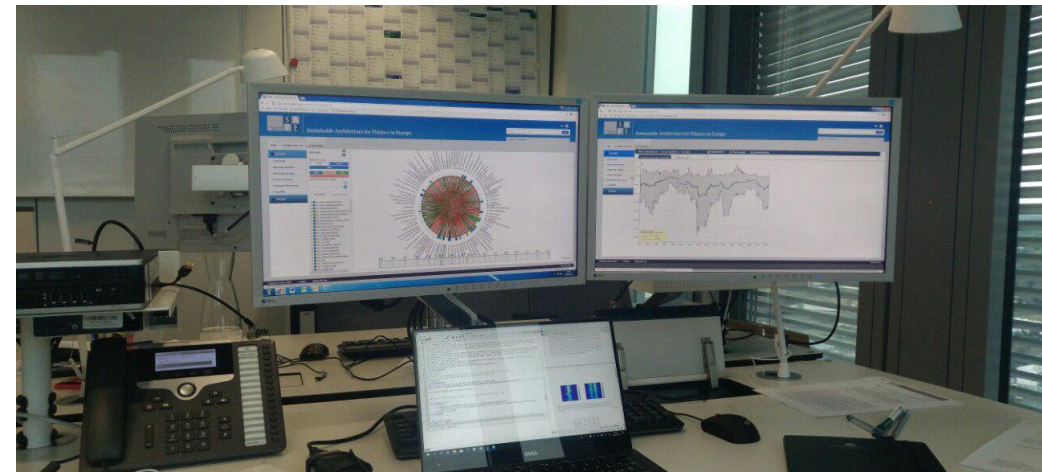
WHO WOULD LIKE SOME HOMEWORK?

kristin.kraav@etag.ee

HOMEWORK
2 TASKS

Make a Gantt chart for your project

Evaluate a real proposal (section Implementation)

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