Industry and Academia Partnership – Lessons Learned and Project Closeout

Example of the Marie Curie IAPP Project „ChangeHabitats2“

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- Project Changehabitats 2 - Parameters
- Project Closure Definition
- Lessons Learned
- Comparison with Study on Assessing the Research Management Performance (RMP) of FP Projects
- Conclusions and Recommendations

Project Changehabitats2: Network for Habitat Monitoring by airborne-supported field work – an innovative and effective process in implementation of the Habitat Directive – 2011 – 2015

Objectives: intersectoral and international network between industry and academia in the field of environmental monitoring to develop operable, time and cost effective procedures, and (software-) solutions for monitoring habitats using modern innovative airborne data acquisition techniques.

Two **complementary innovative data acquisition methods**, currently becoming established in the market, were used: airborne laser scanning and airborne hyperspectral imagery. Both methods will be evaluated for potential manual and automatic derivation of habitat parameters – **an unsolved problem so far.**

Changehabitats-Parameters	Project Closure Definition	Lessons Learned	Comparison with study	Recommendations

Project Changehabitats2:

- 8 partners from 4 countries, DE, AU, PL, HU; 3 universities (TU BA Freiberg, TU Wien UO Debrecen), 5 SME (YGG-Rahner, YGG-Diemer, ATMOTERM, RIEGL, VITUKI)
- Many fellow secondments **44!**, compared to other MC IAPP Projects
- Thus increased administration and monitoring necessary
- SME necessities respected, thus very specific secondment durations (SMEs need the fellows at home, cannot compensate their expertise quickly)
- Gender and family topics respected, thus very specific secondment durations, to give young scientist- parents, and -women with young kids a chance to participate
- Drop-out of large SME after one year, but money had been allocated by EC to them already at project start
- Frozen second money tranche for more than 1,5 years until new project plan was approved by EC caused tough working conditions for all consortium partners, but especially the SMEs.

Project Closure Definition: Project Closure is the final project phase, securing:

- Structured project exit
- Formal close-out steps to customer and team
- Review project success and lessons learned
- Find transit into new topics and projects (TOK)

<u>Necessary activities</u>

- Compile reports
- Compile documents
- Check if all requirements are met
- Check if all deliverables are delivered and accepted
- Disperse team
- Disburse resources

Before final meeting

- SKYPE meeting for planning review meeting
- T&A List update and communicate to team
- Communicate as early as possible to partners

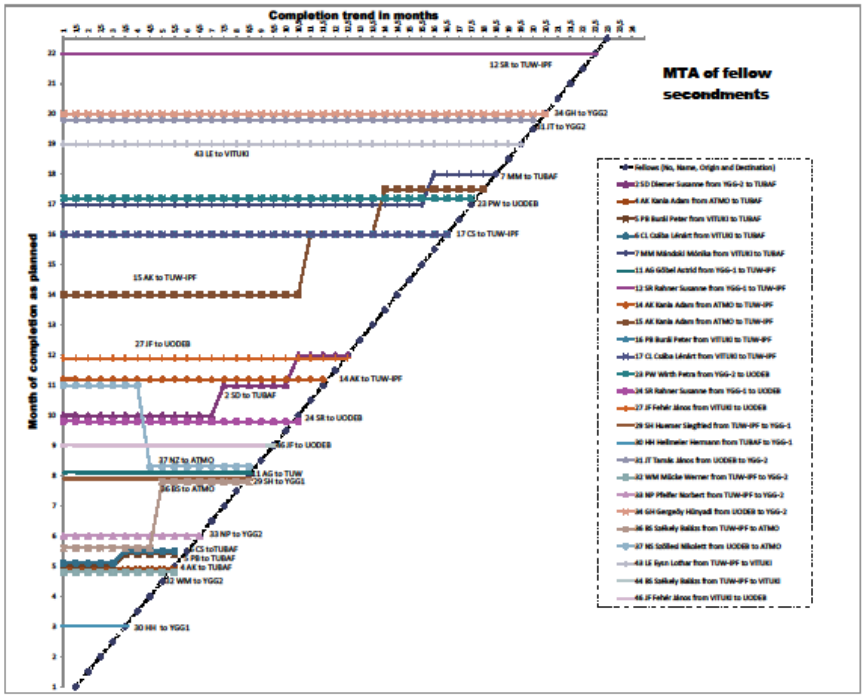
During final meeting

- Recognize work done and celebrate!
- Lessons learned review meeting
- Post project review survey

After final meeting

- Conduct formal close-out administration and exit-criteria
- Review survey - evaluate and communicate
- Archive documents (watch out for sensible data!)
- Ensure TOK (Transfer of Knowledge)
- Post evaluation (financials, risks, changes)
- Recommendations for future (to team, to customer, stakeholders)
- Look for new funding, projects, activities

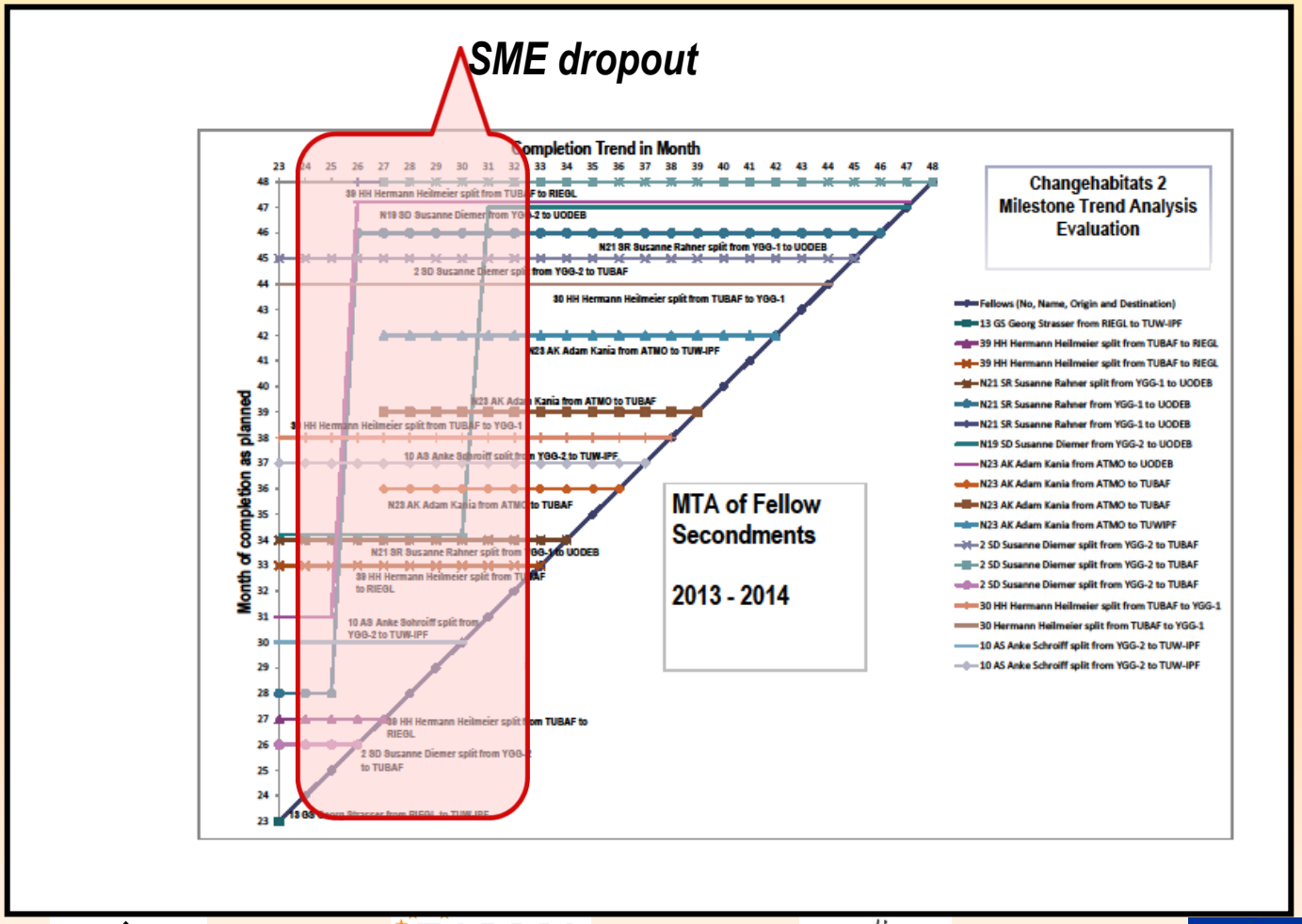
Changes during Project Lifecycle



Milestone-Trend-Analyis – Overview

2011 - 2012

Changes during Project Lifecycle



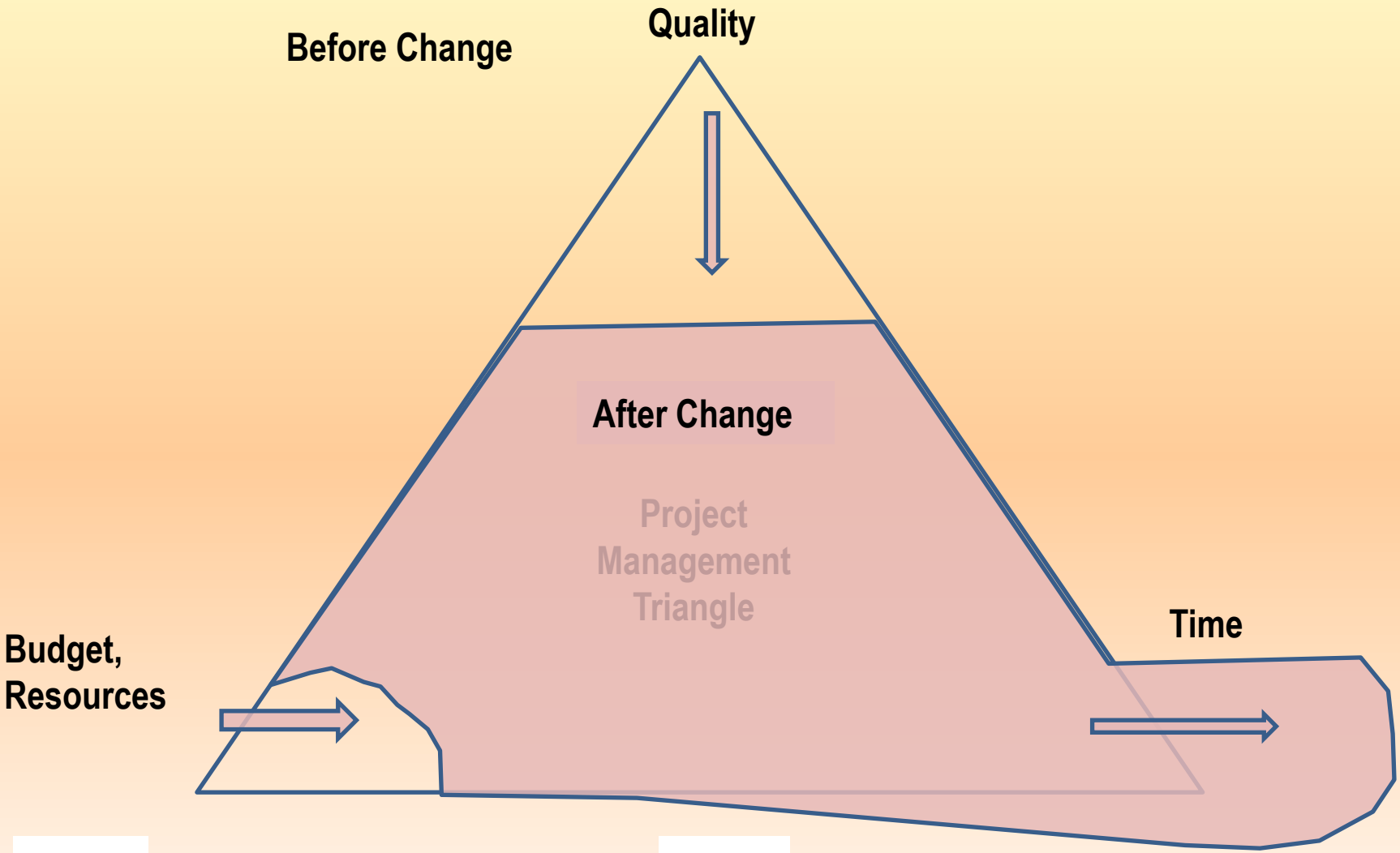
Milestone-Trend-Analyis – Overview

2013 - 2014

Changehabitats-Parameters	Project closure definition	Lessons Learned	Comparison with study	Recommendations

Change Name	Change Type (Planned / Unplanned)	Change Type	Main Driver	Affected Players	Impact to project as a whole	Severity of damage
Partner enterprise terminated	unplanned	discontinuous and radical	National Government	all	2	3
Money frozen	unplanned	discontinuous and radical	EC	all	4	4
GPF Amendment negotiations necessary	unplanned	discontinuous and radical	EC, Coordinator, PMO	all	3	2
Planned operational dates change	planned	small, continuous,	single participants and groups	single participants and groups	1	1
Field work and flights change due to weather	unplanned	small, continuous,	Weather	single participants and groups	1,5	1
Field work and flights change due to life cycles	unplanned	small, continuous,	Life cycles	single participants and groups	1	2
Field work and flights change due to competing projects	unplanned	small, continuous,	competing projects	single participants and groups	2	3
staff person falls out (new job, pregnant, moves)	unplanned	small, continuous,	competing projects	teams od partners	3	1
received additional time for project completetion	unplanned	discontinuous and radical	EC	recruitment times and personell	2	**positive impact**

Changehabitats-Parameters	Project closure definition	Lessons Learned	Comparison with study	Recommendations



Lessons Learned – Review Questionnaire

I had no schedule. The idea is to allow scientists good work within the predefined project context.

If a pre-defined result / deliverable is realised, the schedule is of lower importance.

rather well (80%)

At the end of the last year, due to 4th quarter issue in SME , some night shifts were necessary as a result.

As with most projects, the time schedules at beginning, during and at end of the projects vary. Working plans are changed.

Some tasks need less, some more attendance than previously expectd.

This project more than fulfilled expectations from my time schedule.

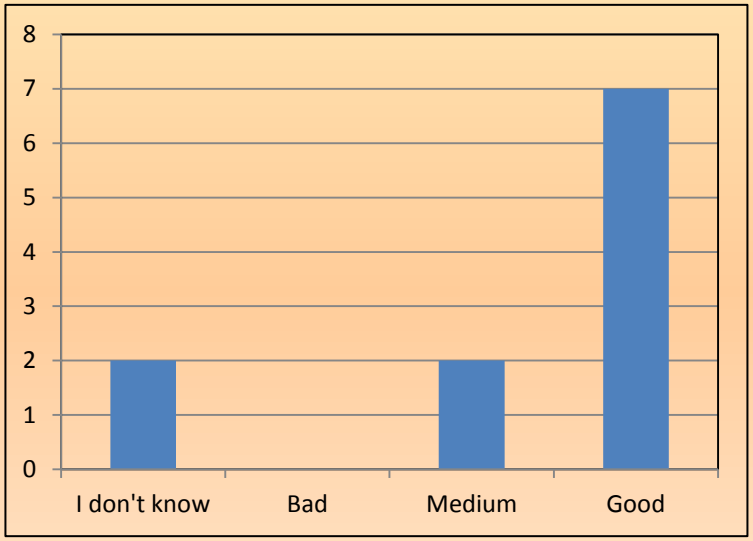
The financial Management is well in time.

For me it was perfect.

Some secondment reports were not delivered in time.

Perfectly prepared by the management body, we kept our time schedule.

Question 1: How well was your project completed according to time schedule ?



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For customer we often have to cheat, since we take more time to tasks than is allocated in the budget

For ourselves it is very valuable, we learn a lot on how long something takes, this is good for future time-and-budget estimating, and for self-management

Time Management is time consuming. Its benefits must be communicated along through the entire project.

From viewpoint of coordinator: do not shift complicated tasks into the future

From viewpoint of coordinator: communication with project partners should be the right mixture between early announcement and just-in-time reminders of not yet achieved deliverables

Our templates on Financial Management, Project Management and the Task& Allocation template were useful.

Lots of additional money is needed to tackle delays caused by the EC, this was a problem in this project.

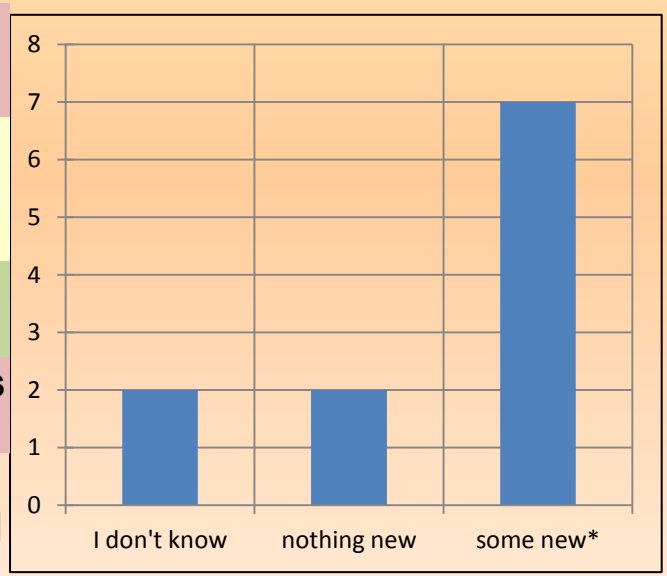
Everyone should keep the deadlines.

Coordinator should give earlier deadlines, then everyone will keep the real deadlines.

The most important thing that I learned was that management is the most important thing.

Intensify work or, in particular, communication and strategic pulling (demanding), at the very beginning of the project.

Question 2: What have we learned about Time Management that could be useful for our future projects?



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At an early stage decide (for yourself), which partners will deliver what, and do not continue hoping that they deliver later.

Training and assessment is important for our future projects.

LASER scanning procedure and new software (Landmodels)

Specifications must be perfectly accorded to project tasks.

Regular synopsis of financial statements of all partners is necessary.

Communication tools (i.e. Skype)

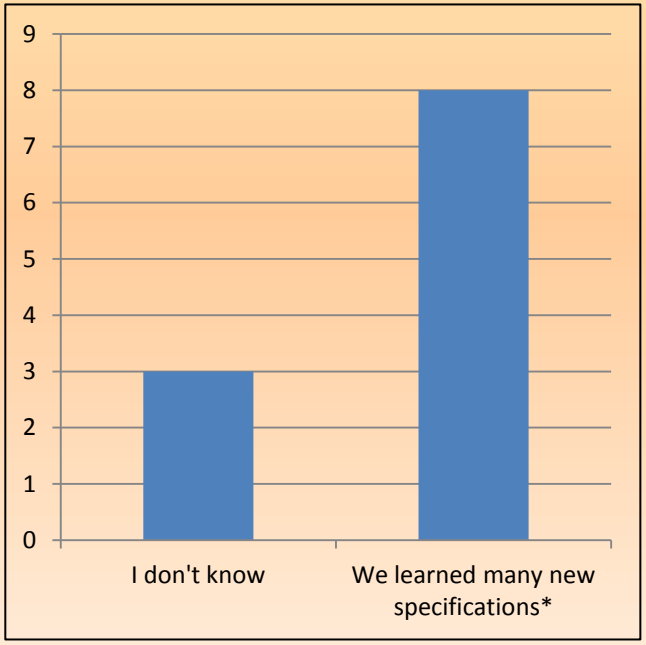
Project Management tools, i.e. Task & Allocation List

EC language and project administration by EC.

Start simple, make it more detailed as you go along in the project.

Do not be over-beauraucratic at the beginning, later you will not use those overburdened templates.

Question 5: What have we learned about elaborating of specifications that could be useful for our future projects?



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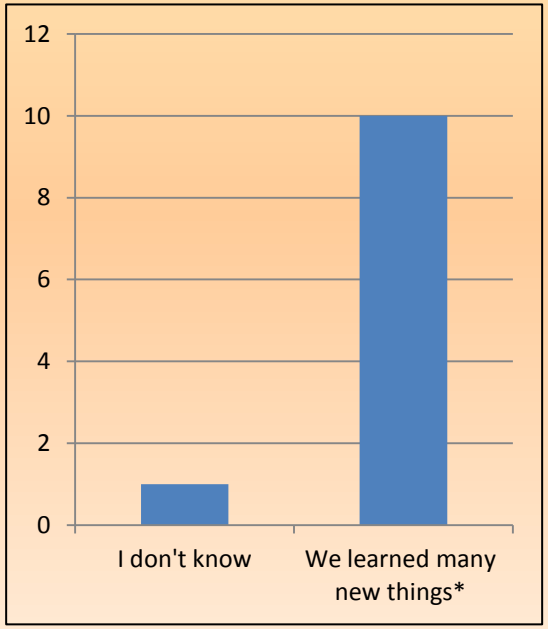
Selection of people to be seconded should be made more careful.
Clear goals are necessary.
Continuous communication is necessary, this is hard work.
No collective emails.
Emails not too long, people will not read them.
Build sub-groups (maybe in partner institutions or across topics).
Write emails specifically, maybe in the specific language even.
Do not be too technical, it is good to be personal, emphatical.
PMO was very good.
Regular meetings/Skypes were very good.
Changing the locations for the physiucal meetings was very good!.
Visit the partners, invite them to your own location.
Let fellows develop and decide on own ideas, especially for the TOK.
Educate the partners on how to make a perfect Form C.
PMO was good (Skype, Teleconferences on regular bases, each 2-3 weeks).
Maybe less information in the emails would be good, but it was all very informative and exact.
Communication is the key to success.
Regular meetings, clear tasks are required.
Continued clear communication control and help is needed.
Define "internal" project team for each partner, involve them stronger to enforce "teamgeist"
Keep the deadlines in mind and hold them.

Question 6: What have we learned about Staff Management that could be useful for our future projects?



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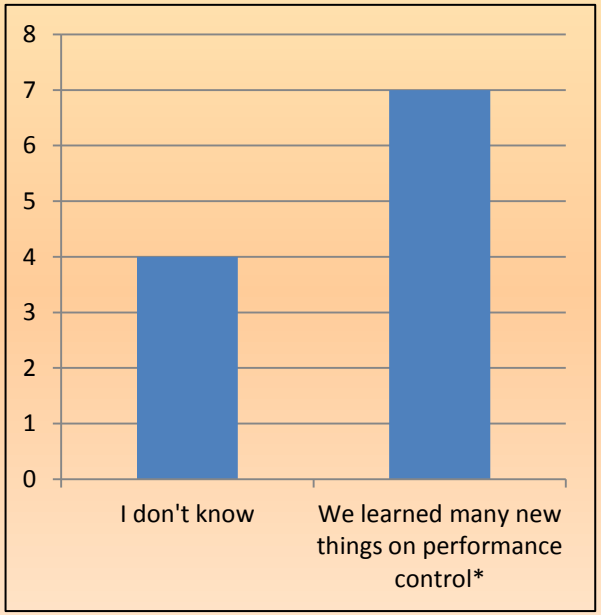
Start early with asking for the deliverables.
Make easy management tools.
Use few tools, but then regularly.
make things visible and disseminate it to the partners regularly.
Task & Allocation list was very good.
MTA was good for presenting to EC Officer.
Task & Allocation list was very good.
Have stricter control on secondment reports.
Do things well in advance.
Keep constant contact with the partners.
Very useful tool: Task & Allocation List.
The indicators perfectly fitted to the project's milestones.
Define performance requirements / parameters at the very beginning.

Question 7: What have we learned about performance control that could be useful for our future projects?



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Kickoff Meeting very important, for trust building.

Make small partner teams in remote locations.

Get to know each other.

Visit each other at home.

PMO is good, must be visible, and authorized at kickoff meeting.

Coordinator should be part of PMO.

Different responsibilities must be part of PMO (Scientific, financial, management).

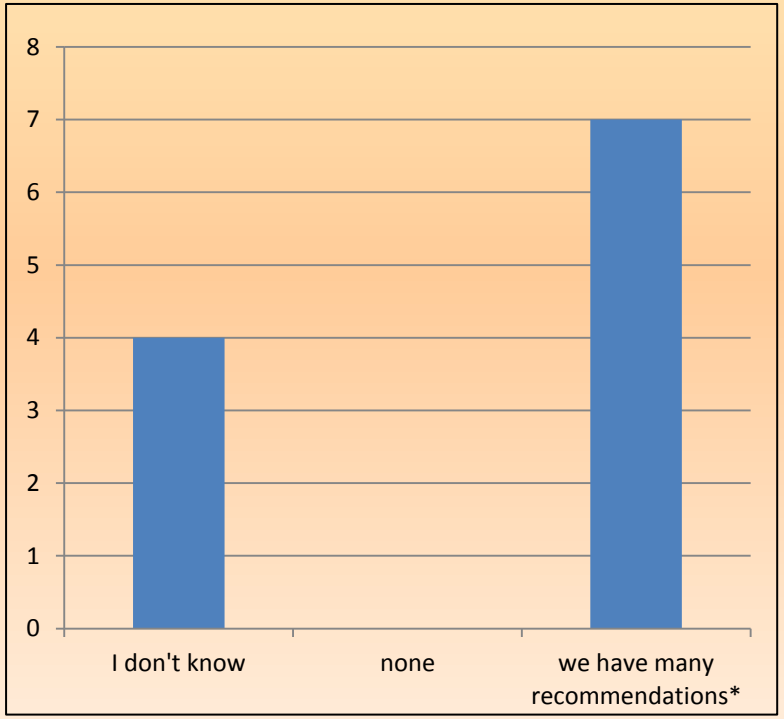
Establish closer contacts to a broader range of potential (end-)users.

Partners should be more involved in design and writing the work packages.

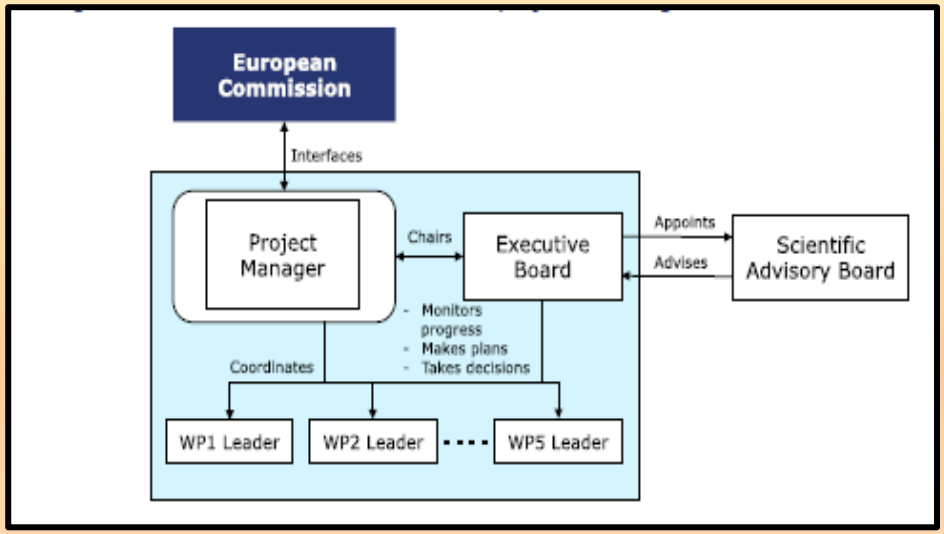
Explain more in detail mainly the tasks of each partner.

Focus on people!

Question 11: What new recommendations do we have for future research and development?



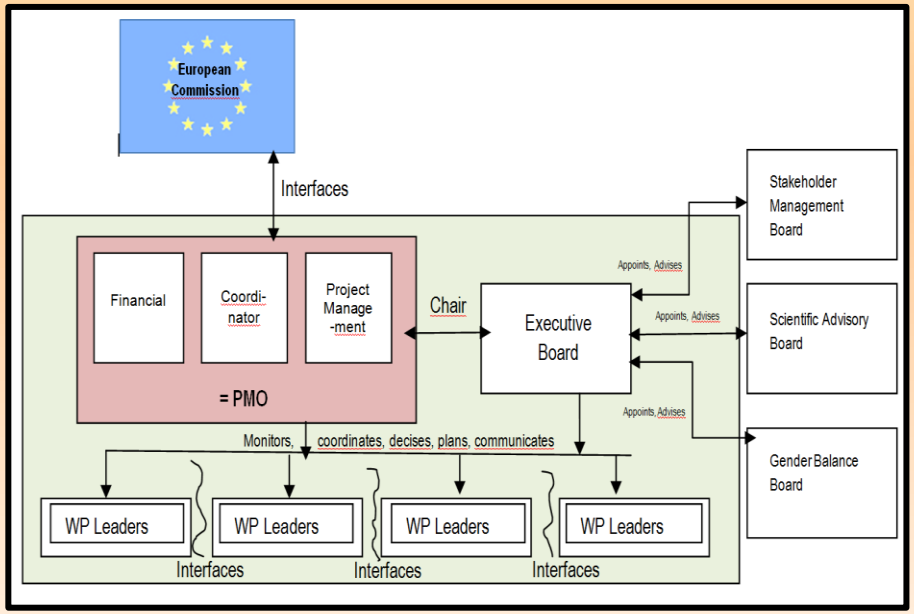
Comparison with Framework Programme Study*: Management Model used



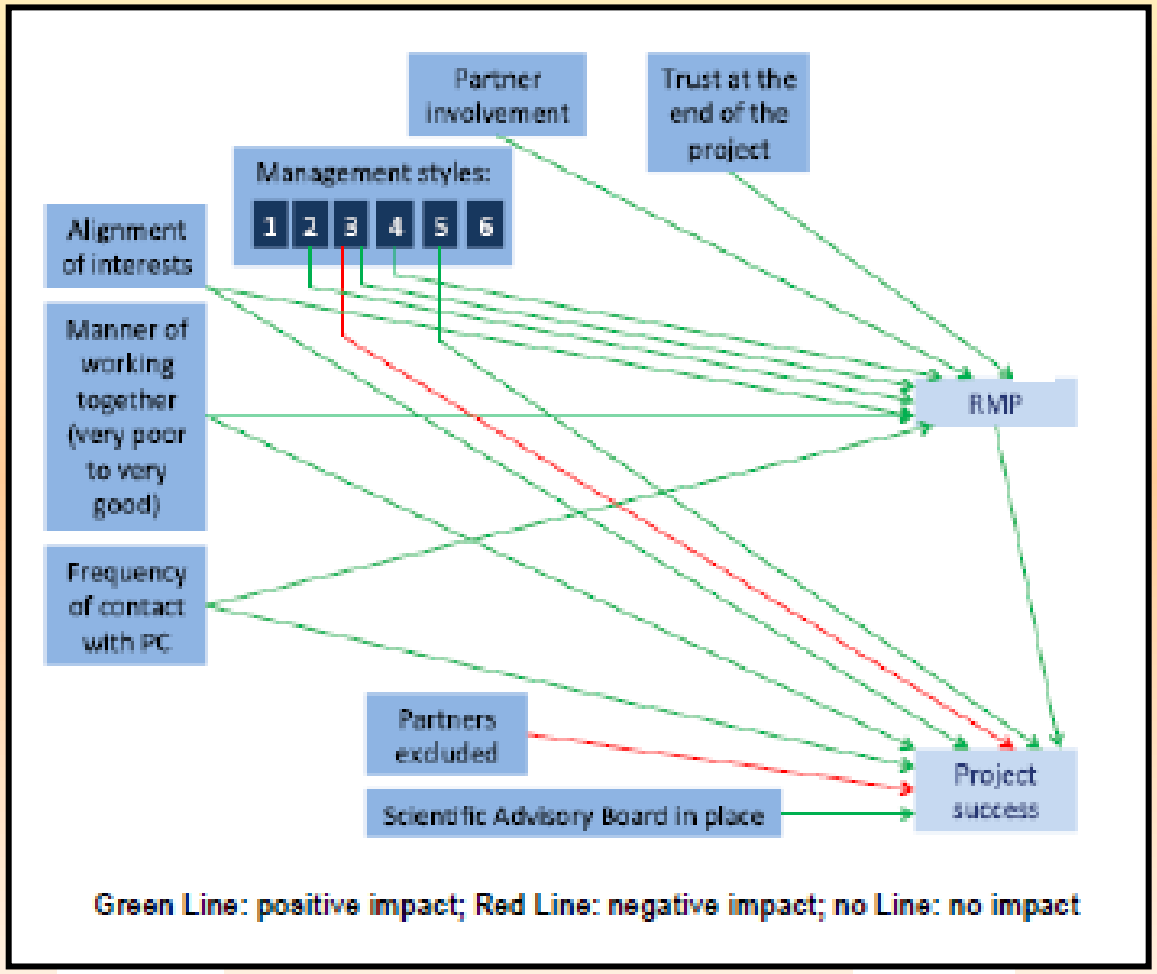
Basic Study Model for High Performers

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Change Habitats2 - Model



Success Enablers and Disablers in Study



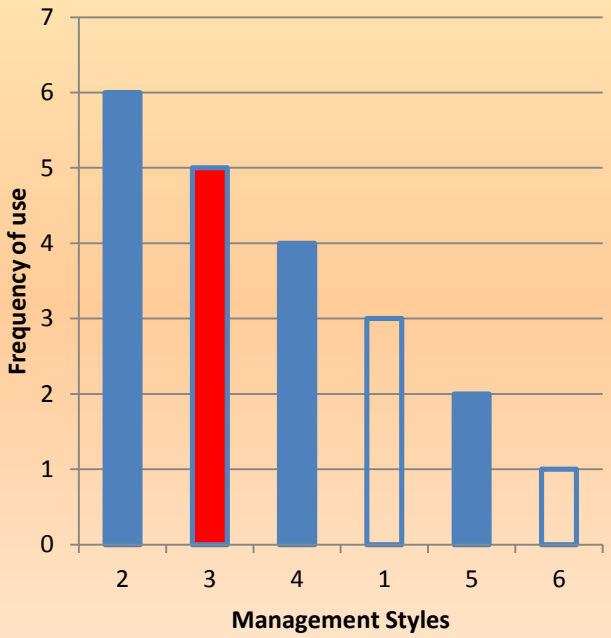
Management Styles

1. Refer to contract agreements & use accountaility
2. Benefit from Scientific Leadership & personal reputation
3. Timely information sharing
4. Invest in one-to-one communication and build relationships
5. Rely on established relationships and high trust levels
6. Use network power such as positions in other consortia and in high-level committees

Success Enablers and Disablers in Study and Changehabitats

Management Styles	No	impact on RMP	Impact on project success	in ChangeHabitats (Rank of % use)
Refer to contractual agreements and use accountability	1	-	-	4
Benefit from Scientific Leadership and personal reputation	2	enabler	-	1
Timely sharing of information	3	enabler	disabler	2
Invest in one-to-one communication and build relationships	4	enabler	-	3
Rely on established relationships and high trust levels	5	-	enabler	5
Use network power such as positions in other consortia and high-level committees	6	-	-	6
Consortium Cooperation				**carried out in ChangeHabitats**
Alignment of interests		enabler	enabler	partly
Manner of Working together		enabler	enabler	partly
Frequency of contact with PC		enabler	enabler	good
Partners excluded		-	disabler	yes (beyond our responsibility)
Scientific Advisory Board in place		-	enabler	good
Partner involvement		enabler	-	good
Trust at the end of project		enabler	-	partly

Management Styles Use Frequency in ChangeHabitats



Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

Consortium	
Coordinator	Scientist, researcher
	Working at university or research centre
Team	Mix of old contacts and some fresh partners
	Little change in composition during life cycle
Functions	Basic Management model with Coordinator / WP Leaders / Executive Board / Backup Group (PMO)

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

Management Process
• Back-up Office (=PMO)
• Communication inside Consortium + meetings prioritised
• Involving all in decision making
• Executive Board and GA
• Problem-tackling by frequent communication, also one-to-one
• Financial Management supported by Expert in PMO
• Few, simple tools regularly used (in Changehabitats Task& Allocation list, 0-100-Method, MTA, Gantt exchange)
• **More budget allocated to Project Management is needed**

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

Project Management Tools
Few, simple, easy to learn, easy to monitor, software used by all:
• Task & Allocation List
• 0-100-Method
• MTA
• Gantt exchange
• Minutes Gantt
• Reporting Templates
• **Tools provided by EC are often too rigid and complicated, and not working**

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

Internal Communication
• Physical meetings, whenever possible
• Skype Meetings
• Ad hoc Meetings
• Conferences, workshops, visits
• Communication must be seen as Top Management Priority

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

Quality Management

- Monitor progress
- Communication
- Quality evaluation

SME needs

- further investigation carried out by EC, in order to design more SME-tailored programmes

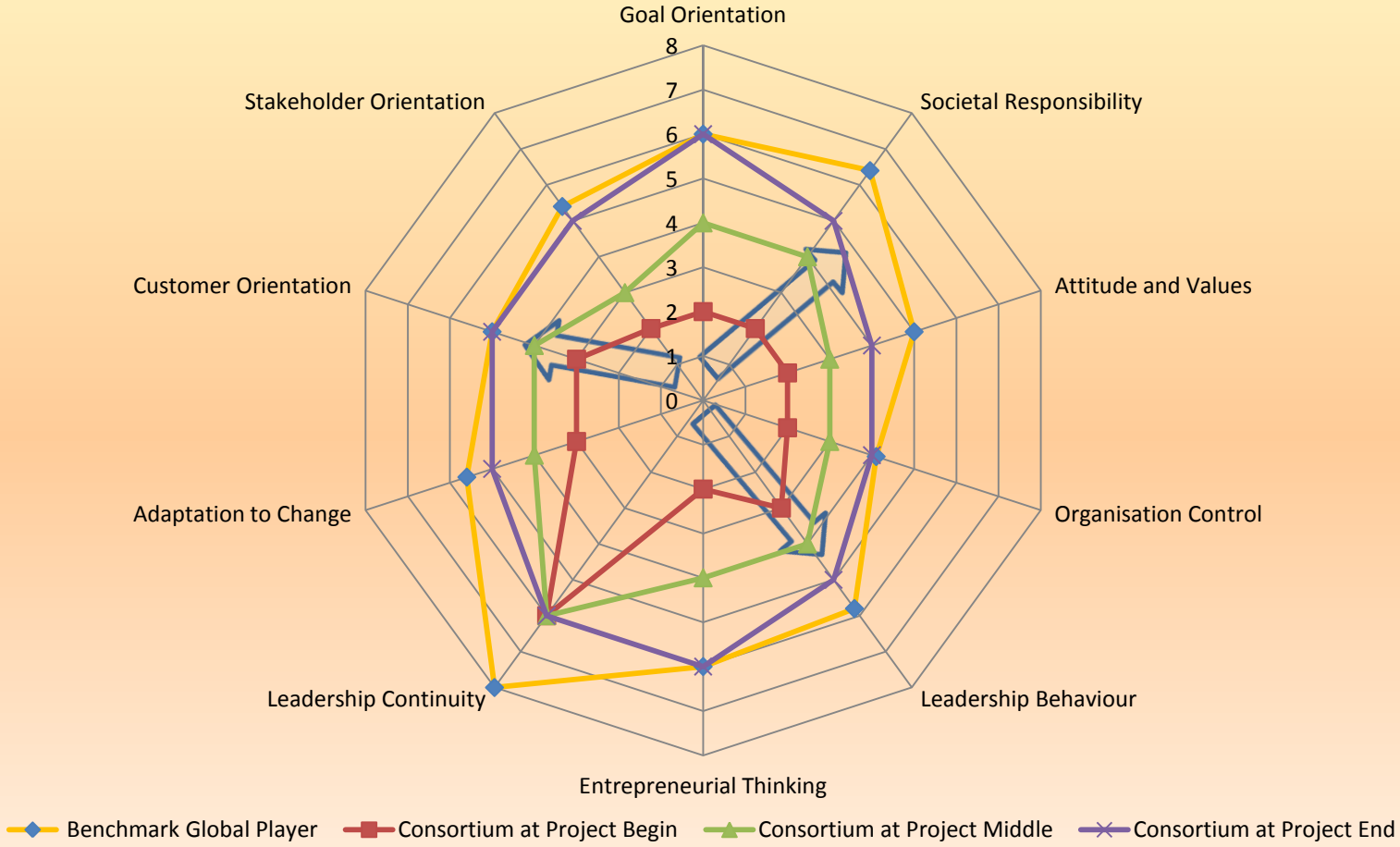
*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

Changehabitats and Framework Projects Study 2014* : Good Practice and Recommendations

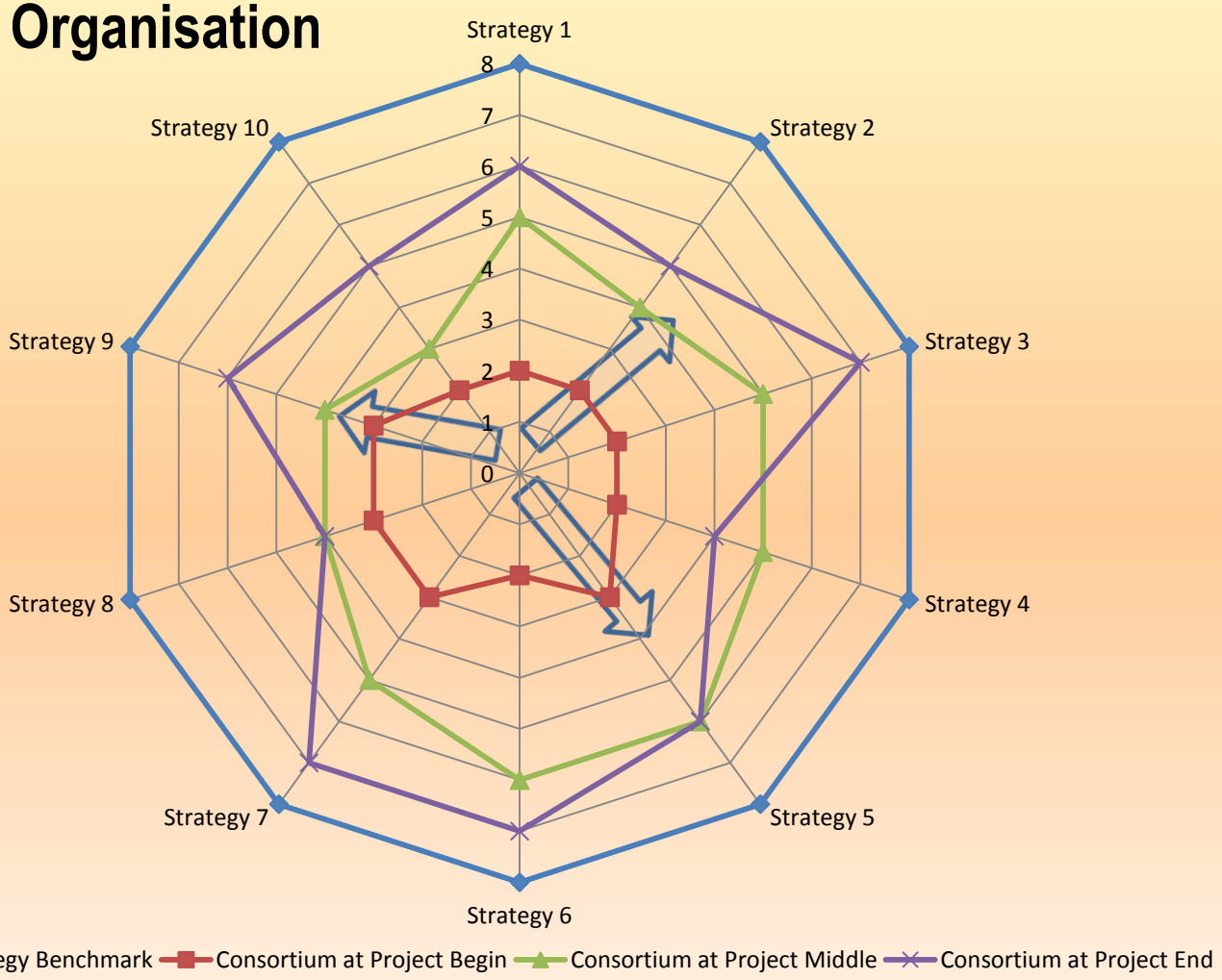
Collaboration Culture
• Alignment of Interests
• Good working together
• Frequent contact to PC in Brussels
• Build relationships
• Build trust
• Develop collective thinking of „we“, norms, culture
• Build collective Learning
• Be a „learning organisation“ **(= one of the key issues for global players)**

*Jansen, W. et al. 2014: Study on Assessing the Research Management Performance (RMP) of Framework Programmes Projects – Final Report October 2014

The Learning Organisation



Your Own Learning Organisation



Thank you very much for your attention!

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