



## **FP7 Marie Curie Initial Training Networks**

### **Mid-Term Review:**

# **A contractual obligation and a fruitful dialogue**

### **Guidelines for the Mid-Term Review<sup>1</sup>**

January 2014<sup>2</sup>

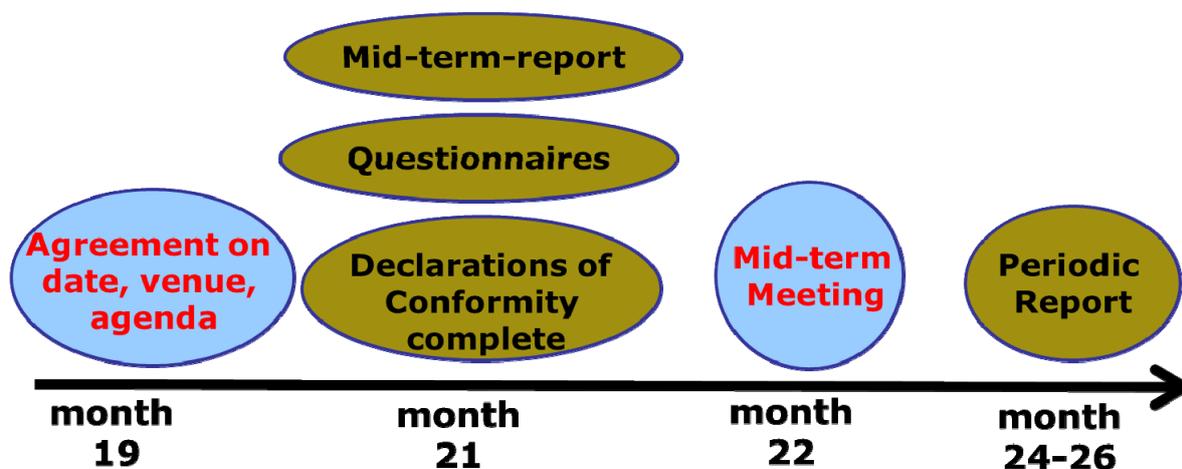
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<sup>1</sup> These guidelines shall guide through the organisation of the meeting. See the official Guidance Notes on project reporting at [ftp://ftp.cordis.europa.eu/pub/fp7/docs/itn\\_reporting\\_guidelines.pdf](ftp://ftp.cordis.europa.eu/pub/fp7/docs/itn_reporting_guidelines.pdf)

<sup>2</sup> REA P4 - 15/01/2014

## 1. OBJECTIVES OF THE MEETING

ITN project consortia shall organise a Mid-Term Review (MTR) meeting.<sup>3</sup> The MTR assesses the fulfilment of all aspects (scientific, research training, management, etc.) described in Annex 1 of the GA. Particular attention is paid to the training activities and networking aspects including activities across different sectors. As such, the review is not just a scientific evaluation of the Network nor should it be the first point at which problems are brought to the attention of the REA. It should be understood as a constructive dialogue between the network participants and the REA project officer and is a valuable source of feedback to both the consortium and the REA.



## 2. PARTICIPANTS AND THEIR TASKS

The project coordinator, the scientists in charge, the representatives of the Associated Partners (if any), as well as the appointed Early Stage and Experienced Researchers must attend the meeting.

The REA project officer will attend and, in addition, an external Expert Reviewer might be appointed to review the project. The coordinator will be informed about the name of the expert in advance. The Expert Reviewer is subject to full confidentiality agreements therefore should be fully included in all discussions.

The consortium may also choose to invite an additional external scientific expert to the MTR meeting to contribute to the scientific discussions but at the expense of the project. However, the REA must be informed in advance of any external persons participating.

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<sup>3</sup>According to art. 7, Special Clause 5 Bis, III.2.1-c of the Grant Agreement (GA).

Checklist for Coordinator and Fellows:

***The Coordinator:***

- ◆ To propose a date and venue for the meeting not less than 2-3 months in advance.
- ◆ To propose an agenda to the Project Officer.
- ◆ To submit via SESAM the **Mid-Term review report** (Not less than 1 month before the meeting).
- ◆ To check that all Declarations of Conformity for appointed fellows are submitted (to be submitted within 21 days of the recruitment and in any case before the meeting)
- ◆ To organise the logistics for the meeting.
- ◆ To chair the Mid-Term Review meeting.
- ◆ To present an overview of the network's progress in the meeting.
- ◆ To circulate the REA's assessment to all Network partners and to arrange for any necessary follow-up.

***The Marie Curie fellows:***

- ◆ To submit the online **mid-term assessment questionnaire** (at least 2 weeks prior to the meeting).
- ◆ To prepare a slideshow and/or a poster to be presented during the MTR meeting, where they will present their project and results/achievements so far.

### **3. THE MID-TERM REPORT**

The Mid-term report forms the basis for discussion at the MTR meeting. The report should cover the first half of the project implementation. It should be prepared according to the templates provided in the official Guidance Notes on project reporting.<sup>4</sup> In particular, the report should demonstrate the achievements in relation to the initial project objectives, in terms of:

- ◆ scientific results,
- ◆ research training,
- ◆ networking and transfer of knowledge,
- ◆ dissemination,
- ◆ outreach activities and
- ◆ management.

The report should also include up-to-date information on the delivery of recruitment months and should justify any deviation, and provide information in relation to on any international conferences or events the consortium has organised or taken part in. Any relevant material highlighting the most significant results of the project (e.g. reviewed scientific publications, invited papers, patent descriptions, media coverage, prizes, awards, etc.) should be attached as separate annexes in SESAM.

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<sup>4</sup> Report template is available in SESAM

#### 4. THE MID-TERM ASSESSMENT QUESTIONNAIRES

At least 2 weeks before the MTR meeting each recruited researcher employed in the frame of the project must complete and submit the online “Mid-Term Assessment Questionnaire” designed to give the REA feedback on the training/research activities of the fellow.

The questionnaire is available at the following link:

<https://webgate.ec.europa.eu/sesam-fp7/questurl.do>

The Instrument, Project type and Questionnaire type options must be chosen in order to edit and submit the questionnaire (see picture):

Select questionnaire type

Please select the type of questionnaire you wish to fill-in for your project, following the steps below:

1. In the 'Instrument' selection list, set the instrument of your project.
2. In the 'Project type' selection list, set the type of your project.
3. In the 'Questionnaire type' selection list, select the type of questionnaire you wish to fill-in.
4. Click the button 'Edit Questionnaire' to proceed.

Instrument: MC-Support for training and career development of researchers (Marie Curie) ▼

Project type: MC-ITN-Networks for Initial Training (ITN) ▼

Questionnaire type: Mid-Term Assessment Questionnaire ▼

Edit Questionnaire

The information requested in the questionnaire will be treated confidentially by the REA and will mainly be used for assessing the level of satisfaction of the fellows and the overall impact of the action.



*Please inform your MC Fellows that the assessment questionnaire is an opportunity to make suggestions on how to improve the training opportunities in the network.*

#### 5. AGENDA OF THE MEETING

The agenda shall be agreed with the REA project officer. The meeting should have a duration of **one working day**.



*Date, agenda & venue of the meeting need to be agreed with the Project Officer*

- 1) **Introduction:** Short introduction by the REA project officer, the Expert Reviewer and the Project Coordinator (~15 minutes).
- 2) **Tour de table:** All scientist-in-charge should briefly present their research team and describe their role within the network. Introduction of the Associated partners (if any) (~30 minutes).
- 3) **Coordinator's report:** Presentation on the Network and the Mid-Term Review Report covering each of the following aspects (~between 45 and 60 minutes):
  - i. **Scientific**
    - The scientific, technological or socio-economic reasons for carrying out research in the field covered by the research;
    - The research objectives of the network;

- Scientific highlights of the work so far.
- ii. **Training**
    - The training programme (distinguishing between that ESRs and ERs);
    - Secondments;
    - Complementary skills;
    - Training events open to external participants.
  - iii. **Networking**
    - How the Network functions and how the partners cooperate in practice;
    - Interaction with private sector;
    - Dissemination and outreach activities.
  - iv. **Management**
    - Recruitment report (with relevant statistical data);
    - Management meetings (activities of the Supervisory board, etc.);
    - Financial aspects;
    - Any proposed re-orientations of the networks' activities.
- 4) **Fellows' individual reports:** Every funded fellow will present the project and results or achievements so far. *Scientific content is expected* in the presentations. Two options or a combination of both are feasible:

#### **Option 1: Slideshow**

The fellows should briefly present themselves, their background, and their training experiences within the Network (~10 minutes/fellow).

Most importantly, the fellows should show the main objectives of their projects, methodology used and main results obtained so far. The end of the presentation should include the fellows' expectations on the possible impact of the action on their future career.

#### **Option 2: Poster session**

The fellows should prepare a poster showing the main objectives of their projects, methodology used and main results obtained so far.

This session should take about 2 hours (depending on the number of fellows), with each fellow presenting shortly in an interactive manner her/his poster to all others (ca. 10 minutes each).

At the beginning of the presentation, the fellows should briefly present themselves, their background, and their training experiences within the Network. The end of the presentation should include the fellows' expectations on the possible impact of the action on their future

- 5) **Meeting between the MC fellows and the REA representative:** Discussion with the Project Officer about their experiences within the Network in terms of training, progress and impact on their future careers. (~ 1-2 hours depending on the number of fellows). Main focus will be on:
- i) **Administration:** Declaration of Conformity, Annexes awareness, working conditions (employment contracts, eligible allowances, visa issues, administrative support), tuition fees.
  - ii) **Supervision and integration:** Quality of the supervision, integration within the research team/the network/the host institution/ the country.
  - iii) **Training:** Effectiveness of the Career Development Plan, secondments, PhD courses, attendance to external courses/workshops/conferences, language courses and complementary skills training.

- iv) **Scientific:** Progress of projects, time schedule, achievements (publications/patents, etc.), acknowledgement of funding source.
- 6) **Feedback and open discussion:** Feedback from the REA Project Officer and the Expert Reviewer and discussion on the output of the Network so far, on possible training areas for future exploitation or the impact on the fellows' future careers development (~ between 30- 60 minutes).
  - 7) **Restricted session (optional):** Meeting between coordinator/partners/financial managers and Project Officer to discuss financial issues (~30 minutes).
  - 8) **Site visit (optional):** Review how the host institution exemplary is operating to meeting the project objectives.

## 6. ISSUES TO BE CONSIDERED FOR THE PROJECT ASSESSMENT

### Scientific

- Is the collaborative research being focused on the objectives set out in Annex I?
- Are all the teams contributing to the project as foreseen in Annex I?
- Is there meaningful working co-operation between the teams?

### Research Training Programme

- Is it in line with the plan as established in Annex I?
- Are all the fellows being satisfactorily integrated in the project?
- Are they being given sufficient opportunities to interact with Network researchers outside their own team?
- Are there appropriate secondment opportunities available?
- Is the complementarity and multidisciplinary being sufficiently exploited within the Network in its training programme?
- Is sufficient complementary training (e.g. presentational skills, language skills) being organised both by the Network and by the individual research teams?
- Are Associated Partners involved in the training/secondment activities?
- Industry exposure

### MC Fellows

- Appointment of fellows to date as foreseen by the Grant Agreement?
- Are the fellows sufficiently informed about their role and the role of the other participants?
- Are they aware of all the allowances they are entitled to?
- Are they also aware about the possibilities offered to them via networking (e.g. to attend network meetings, secondments etc.)?
- Are all the fellows recruited under an employment contract?

### Management

- Is the organisation of the Network and the distribution of tasks between the teams well adapted?
- Is the Network co-ordinator demonstrating the necessary scientific and organisational competence?
- Is full advantage being taken of modern communication and Internet-based services?
- Has the necessary decision-making structure been established within the network?
- Are all the participants aware of the basic rules (e.g. eligibility criteria, allowable costs etc.)?