

FP7 Marie Curie Initial Training Networks

Informal guidelines for the Mid-Term Review

These guidelines are not an official document of the Research Executive Agency services.

See the official Guidance Notes on project reporting at
ftp://ftp.cordis.europa.eu/pub/ftp7/docs/itn_reporting_guidelines.pdf

Mid-Term Review a contractual obligation... and a fruitful dialogue

The consortium shall organise a Mid-Term Review meeting (art. 7, Special Clause 5 Bis, III.2.1-c) of the Grant Agreement).

The Coordinator shall agree with the Research Executive Agency the date, the venue and the agenda for the meeting at least two months in advance of it. It is recommended to take place between around month 22 of the project. Representatives of each beneficiary* and all funded fellows must attend the meeting.

The Mid-Term Review report forms the basis for discussion at the meeting (art. III.5) The Coordinator shall submit this report via SESAM at least one month in advance Mid-Term Review meeting.

Please note in particular that at least two weeks before Mid-Term Review meeting all recruited researchers employed in the frame of the project must complete and submit the online Mid-Term Assessment questionnaire.

Particular attention is paid to the training activities and networking aspects including activities across different sectors. The structure of the network and the Grant Agreement's work programme will also be reviewed. As such, the Mid-Term Review is not just a scientific evaluation of the Network nor should it be the first point in the course of the Grant Agreement at which problems are brought to the attention of the Research Executive Agency.

The Mid-Term Review should be understood as a constructive dialogue between the network participants and the Research Executive Agency project officer and is a valuable source of feedback to both the consortium and the Research Executive Agency (REA).

The REA may choose to appoint an Expert Reviewer to conduct the Mid-Term Review in place of, or in addition to, the Project Officer. The Expert Reviewer is subject to full confidentiality agreements therefore should be fully included in all discussions.

Additionally, the consortium can choose to invite an external scientific expert, at the expense of the ITN project, to the Mid-Term Review meeting to contribute to the scientific discussions. The REA must be informed in advance of any external persons participating.

*Please note: for projects negotiated under ITN 2010 or later calls: representatives of the Associated Partners must also attend the event (Annex III to the Grant Agreement, article III.2.1.c).

The Mid Term Review report (Progress report for mid-term of the project)

All Initial Training Networks will undergo a Mid-Term Review involving the Coordinator, the scientists in charge, the currently (and possibly previously) appointed Early Stage and e-Experienced Researchers and the Research Executive Agency Representative(s). The Mid-Term Review report forms the basis for discussion at the meeting.

Mid-term review report

At least one month in advance of the Mid-Term Review meeting the Coordinator shall submit a report (Progress report template available in SESAM) covering the period from the beginning of the project until the date of mid-term review.

The Mid-Term review report should be prepared according to the templates provided in section 11 of the official Guidance Notes on project reporting and should demonstrate the achievements in relation to the initial objectives described in Annex I.

The Mid-term review report describes the significant outcome of the work performed during the period covered, in terms of research training methodologies, scientific results, networking and opening up of career opportunities to Marie Curie research fellows.

The report must make explicit reference to the overall progress of the project and to deliverables update including recruitment and international conferences / events.

Any relevant material evidencing this selection of most significant results of the project, such as reviewed scientific publications, invited papers, patent descriptions, media coverage, prizes, awards, etc. should be attached as separated annexes in SESAM.

Questionnaires

At Mid-Term point, the Coordinator should invite the fellows who are currently employed by the Network to complete a mid-term assessment questionnaire. This questionnaire is designed to give the Research Executive Agency feedback on the training activities of the network.

The information requested in the questionnaire will be treated confidentially by the Research Executive Agency and will mainly be used for assessing the level of satisfaction of the fellows and the overall impact of the action. It is important that the Marie Curie Fellows are informed that the assessment questionnaire is also an occasion to make suggestions on how to improve the training opportunities in the network.

The researchers should also prepare a short presentation covering their experiences (background, research and training at the host institution and network wide, networking aspects, future plans) in the project.

Summary of roles of the principal participants:

The network Coordinator:

- ◆ To propose a date and venue for the Mid-Term Review meeting as soon as possible and not less than two months in advance¹.
- ◆ Not less than one month before the agreed date, to propose an agenda and list of participants to the Research Executive Agency's project officer.
- ◆ Not less than one month before the meeting, to submit via SESAM the **Mid-Term review report**, print it and send it to the Research Executive Agency.
- ◆ To arrange for the recruited researchers to complete the online **MTR questionnaire** not less than two weeks 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 to the meeting.
- ◆ To circulate the Research Executive Agency's assessment to all Network partners and to arrange for any necessary follow-up.

The Project Officer:

- ◆ To agree the date and venue of the Mid-Term Review meeting with the Coordinator.
- ◆ To provide the Coordinator with the Mid-Term Review guidelines.
- ◆ To agree the agenda.
- ◆ To give feedback on the Mid-Term Review to the Coordinator and the network. To follow up any actions that may be required in co-operation with the Coordinator.

The Marie Curie Research fellows:

- ◆ To fill the online **questionnaire** prior to the MID-TERM REVIEW meeting

¹ Normally the venue should be one of the partners' premises. Also, in order to avoid additional costs, it is recommended that the Mid-Term Review meeting is held in conjunction with a regular network meeting.

• Suggestion for Agenda of the Mid-Term Review Meeting

It is recommended that the meeting would have duration of 1 full working day.

- 1) **Introduction (10 minutes):** There will be a short introduction by the Research Executive Agency Representative and the Coordinator.
- 2) **Tour de table:** Each scientist-in-charge should briefly present their research team and describe their role within the network.
- 3) **Coordinator's Report (45 minutes):** A presentation by the Coordinator on the Network and the Mid-Term Review Report. The presentation should cover each of the following aspects and sufficient time should be given to the scientific, training and networking topics:
 - a) **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
 - b) **Training**
 - the training programme (distinguishing between that ESRs and ERs);
 - secondments;
 - complementary skills
 - training events open to external participants
 - c) **Networking**
 - how the Network functions and how the partners cooperate in practice;
 - interaction with private sector
 - d) **Management**
 - Recruitment report
 - Financial aspects
 - any proposed re-orientations of the networks' activities
- 4) **Fellows' individual Reports (10 minutes per fellow):** The Fellows should present themselves, their background, their work, and their training experiences in the Network. This presentation should go beyond the scientific project and should include their expectations on the possible impact of the action on their future career.
- 5) **Meeting between the Fellows and the Research Executive Agency Representative (30 - 60 minutes):** This meeting is intended to allow the Fellows to discuss with the Research Executive Agency Representative about their experiences within the Network.
- 6) **Open discussion:** This discussion will conclude the meeting by summarizing the output of the Network so far and possibly by identifying training areas for future exploitation.

• ISSUES TO BE CONSIDERED

1. SCIENTIFIC

- (1) Is the collaborative research being focused on the objectives set out in the technical annex (Annex I) of the Grant Agreement?
- (2) Are all the teams contributing to the project as foreseen in Annex I?
- (3) Is there meaningful working co-operation between the teams?

2. RESEARCH TRAINING PROGRAMME

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

3. MC FELLOWS

- (1) Has the Network appointed as many fellows to date (person-months) as foreseen by the Grant Agreement?
- (2) Is the Network experiencing any unexpected difficulties in finding appropriate fellows?
- (3) Are the fellows sufficiently informed about their role and the role of the other participants within the network in the planned research training programme?
- (4) Are they aware of all the allowances they are entitled to?
- (5) Are they also aware about the possibilities offered to them via networking (e.g. to attend all network meetings, possibility for secondments etc)?
- (6) Are all the fellows recruited under an employment contract? If not a detailed justification (including documentation referring to the appropriate legislation) must be provided to the Project Officer, unless already agreed.

4. MANAGEMENT

- (1) Is the organisation of the Network and the distribution of tasks between the teams well adapted to the joint project?
- (2) Is the Network co-ordinator demonstrating the necessary scientific and organisational competence?
- (3) Is full advantage being taken of modern communication and Internet-based services (has the network set up an informative home page)?
- (4) Has the necessary decision-making structure been established within the network?
- (5) Are all the participants aware of the basic rules to be followed within the network (e.g. eligibility criteria, allowable costs etc)?

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