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Operation of the project portfolio in the Centre for Fertility and Health

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Project Overview

In the centre department, we manage a substantial portfolio of projects that vary in size, origin, and research location. The projects have different follow-up requirements, but a common factor is that the project manager and the department are responsible for ensuring that there are no deviations related to data management, agreements, finances, etc. There is a varying level of activity in the projects. To have a comprehensive overview of the projects that the centre department is responsible for, regardless of activity level, we maintain a Project Overview. The Project Overview complements the Project Database (PDB) and eProtocol, providing necessary management information about the projects that the mentioned systems do not contain. The Project Overview is maintained as an Excel file containing key information about each project.

Projects without external funding. Project Manager at FHI/Centre but research is conducted in other departments or institutions.	These are projects that have a valid ethical approval and may have received data (either to internal researchers elsewhere in FHI or to partners). Agreements are in place, and terms related to data provision exist. The follow-up primarily involves ensuring compliance with data handling and GDPR. The projects consist of a mix of endeavors, varying in relevance to fertility and health themes. Not all of these projects are highlighted as part of the Centre of Excellence.
Projects with external funding that was applied for and granted to researchers in the centre before the establishment of the centre department.	These projects involve external funding from various sources, where FHI/the centre acts as either coordinator/owner or partner. Most of these projects are highlighted as part of the Centre of Excellence.

Projects with external funding that was applied for and granted after centre department.	These projects involve external funding from diverse sources, where FHI/the centre assumes roles as either the coordinator/owner or a partner. The majority of these projects are actively showcased as integral components of the Centre of Excellence.
Projects launched in the centre department, partially of fully financed by the Centre of Excellence grant.	These projects represent strategic initiatives within the center department that would not have been possible without the Centre of Excellence status and funding. They serve as the cornerstone for much of the academic work within the center, acting as foundational elements even for projects in other categories.

Establishing new externally funded projects

In the centre, we aim to provide researchers with a strong start in project establishment by informing them about the process and details through an approval email sent to those who secure new externally funded projects. The tasks involved in the establishment process for new projects are outlined below. The initiation process should commence with an establishment meeting with the project manager, where the workload is agreed upon and distributed between the project manager and the administrative team. The administrative team takes the initiative to arrange such a meeting.

1. **Receipt of approval letter/e-mail**
    - Receive approval letter/email with information on the granted amount, deadline, and procedure for any revised application (if required) and contract negotiation with the funding source.
    - Project manager receives the information, and we request additional details from them.
2. **Revised application/contracting process**
    - Note: The content of the revised application/contracting process varies among funding sources. It is crucial to familiarize oneself with the information the project manager receives from the funding source to comply with all requirements.
    - The administration team provide assistance to the Project manager to submit the common elements in a revised application/contracting, including:
        - Budget (update salary rates, reallocation of funds, changes in positions or operating resources if necessary)
        - Project period (update, note rules for the first and last possible start/end dates)
        - Progress plan (must be updated if the period changes)
        - Data management plan (often a mandatory attachment to the revised application, before contract signing)
        - Update project description (if the academic plan needs to be changed for feasibility)
        - Additional information if requested by the funding source
3. **Contract negotiation with partners**
    - Coordinate between the project manager and FHI legal services for the preparation of contract drafts.
    - Coordinate between partners and FHI legal services.
    - Types of contracts:
        - Collaboration agreement and data processing agreement according to the legal services template.
        - Consortium agreement (EU).
        - Other collaboration templates relevant to the funding source.

- Register completed agreements in the workspace and archive (P360). Add the project to the CEFH agreement and invoicing overviews.

4. **Internal System Establishment:**
    - Submit a form to the finance department for the creation of a project number in the financial system.
    - Register the project in the center's internal project overview.
    - Create a separate case for the project in the archive system P360.
    - Ensure the creation of a project page on fhi.no (a separate page if the project has its own REK) – remind the project manager to update the text to be "website-friendly."
    - Set up a workspace for the project with the corresponding folder structure:
        - Folder for the original and revised application with associated documents
        - REK, applications, and decision letters
        - DPIA, all versions
        - Research data
        - Individual data sources
        - Contracts and agreements (collaboration agreements and contract with funding source)
        - Financial monitoring
        - Correspondence with the funding source
        - Publishing and open access (publication plan and open access procedures in the project)
        - Communication activities
        - Reporting
        - Other folders tailored to the project's activities

Project kick-off

The establishment phase concludes with a kickoff meeting with the project manager. The kickoff meeting takes place when the process of establishing a contract with the funding source and/or completing most of the tasks mentioned in the establishment section is finalized. The meeting should occur well in advance of the project's formal start. The kickoff meeting addresses the following:

1. **Identification of remaining tasks:**

    - Identify any outstanding tasks from the establishment section. Discuss how to complete these tasks and allocate responsibilities between the coordinator and the project manager.

2. **Contract review with funding source:**

    - Review the contract with the funding source and make the project manager aware of any special requirements for the operation of the project. This could include requirements for a data processing agreement, a plan for postdocs, adherence to Plan S for open science, specific reporting requirements beyond standard ones, etc.

3. **Discussion on project activities:**

    - Discuss what will happen in the project, both academically and administratively. This includes regular meetings, seminars, special events, regular reporting to external funding sources, setting up a project page on fhi.no, practices with status meetings in CEFH, future plans for data sharing, and contract needs. Determine whether the coordinator will assist with REK changes, or if the project manager prefers to manage everything independently.

4. **Clarification of roles:**
    - Goal: Both the project manager and coordinator should leave the meeting knowing their roles in project execution, understanding the division of tasks, and how they will communicate with each other during the project period.

The kickoff meeting is a crucial step in ensuring a smooth start for the project, with clear roles, responsibilities, and communication channels established between the project manager and coordinator.

Develop a follow-up plan

We aim for the establishment and initiation processes described above to result in a follow-up plan documenting the identified follow-up tasks from the meetings outlined above. The plan should particularly detail tasks agreed upon for the coordinator to execute and "drive forward," including fixed deadlines (e.g., for reporting, etc.). The follow-up plan serves as both the coordinator's and project manager's work plan and is discussed as supporting material during the semi-annual status meetings (see description below) held with the project manager and the admin team.

The format of the follow-up plan may vary depending on the project's needs. A simple format could involve listing tasks/activities (a combination of ongoing tasks and one-time tasks) to be completed during the project period in the project workspace (e.g., in Planner). Another option is to outline the project's cycle, with associated tasks and phases, using a "work breakdown structure" or a Gantt chart. In projects with multiple internal and external stakeholders, it can be useful to create a responsibility map clarifying the division of tasks among the project manager, partners/other involved parties, and the project coordinator.

Principles for project management from start to finish at the centre

In the operational phase of the project, there is a need for a methodology that ensures progress and a level of control/monitoring of project activities that align with the project's and project manager's needs. Some projects have clear milestones to achieve, such as data access, data collection, specific deliverables from partners, etc.

Workspace and use of planner

- We create workspaces for each project. In the project workspace, we use "Planner" (a kind of task manager) to allocate tasks in the project among the administrative team and to monitor progress on these tasks.
- In the workspace "Administrasjonsrommet – CEFH," we have task distribution for projects that we consider too small (in scope) or for other reasons where we choose not to create workspaces.
- Projects without workspaces have a dedicated project folder in the workspace "SFF – Centre for Fertility and Health" under "projects." The folders have standardized names: project manager's last name – project's short name – possibly PDB number or other relevant identifier.

Ongoing follow-up

- The centre practices assigning one or more individuals to oversee the ongoing follow-up of multiple projects. In ongoing follow-up, there is close dialogue with the project manager and, if necessary, other project staff.
- Ongoing project follow-up involves tasks related to financial monitoring and reporting, ethics and privacy, data access applications, data sharing, and data collection (if relevant), meetings, assistance with agreements, coordination with partners, communication work, document archiving in P360, etc.
- Resources include checklists from Research Administrative Unit (FAS) for financial follow-up and for research data/approvals, quality documents for data storage and sharing, quality documents for project closure, invoice/financial information on OPUS, legal department information on Opus, and the service "jusskasse."
- For project coordinators "hired" from FAS, close integration with FAS departmental environment and collective knowledge is crucial.

Proactive project management support

- Additionally, the center emphasizes proactive support for project management. This support involves initiating activities defined in the administrative plan and identifying change needs and proposing solutions related to changes that arise in various aspects/phases of the project.
- Proactive project management support includes ensuring compliance with data processing conditions in projects to avoid deviations. The administrative team collaborates to achieve this through ongoing dialogue and effective use of time in the weekly administrative meeting for clarifications on progress and "next steps" in a project.

Status meetings

- As part of proactive project management support in CEFH, the CEFH staff organizes status meetings with all externally funded projects twice a year. Participants include the Project Manager, members of the staff (Research Finance Officer, Research Administration Officer, Head of Administration), and the project coordinator (if the project has a dedicated person in this role).
- The purpose is to have a check-in with the project manager about the progress in the project and what he/she considers potential risks for project operations. The discussion includes project manager responsibilities and the support provided, aiming for a dialogue on how the project is progressing and how it is integrated into the overall academic environment of the centre. This provides a basis for highlighting the project effectively in the CoE's annual report. The status meeting is also an opportunity to assess how the project is operated and followed up, considering any adjustments needed. Significant changes with academic and financial consequences are also discussed in the meeting.
- The content of the status meeting can be adjusted to fit the project manager's needs and preferences.

Project closure

- In addition to regular project closure tasks (ref. tasks within ongoing project follow-up), there is an aim to transfer knowledge from project to project. The principles related to project closure involve bringing out:
- What worked well in the project from both the administrative and academic perspectives.
- What worked less well, and suggestions for improvements.

- The current status of the project regarding the continuation of academic work – either in new applications or as an internal project within CoE.
- Research Administration Officer and Head of Administration convene project closure meetings and conduct them in collaboration with the coordinator, project manager, and other project staff involved in project operations.