



H2020 Marie Skłodowska Curie
Innovative Training Networks
Informal guidelines for the Mid-Term Check (M13-15)

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

1. OBJECTIVES OF THE MEETING

ITN project consortia shall organise a mid-term check (MTC) at M13-15¹. The MTC assesses the fulfilment of the recruitment procedure, the eligibility of the fellows, any deviations of the original training programme and raises awareness on the fellows' and host institutions' rights and obligations.

Particular attention is paid to the following activities:

Management activities:

- Recruitment
- Analysis of deliverables & milestones (related to management and recruitment)
- Management (activities of the Supervisory Board, etc.)
- Ethical issues (if applicable)
- Financial aspects (if necessary)
- Critical implementation risks and mitigation action
- Any proposed re-orientations of the networks' activities.
- Document management and Open Research Data (if applicable)

Fellow's rights:

- Administration: Researcher's Declarations, Grant Agreement provisions awareness, working conditions (employment contracts, eligible allowances, visa issues, administrative support), tuition fees
- Career development plan
- Supervision and integration: quality of the supervision, integration within the research team/the network/ the host institution/the country
- Planned training activities, individual research projects, secondments, PhD courses, planned courses, workshops/conferences, language courses and complementary skills training.
- EID: ESR enrolled in PhD and hosting arrangements should be checked to ensure the 50% inter-sectoral intl. secondments)
- EJD: PhD requirements at each hosting institution, enrolment and recognition of double/joint doctoral degree and hosting arrangements should be checked.

The MTC 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.

As such, the MTC constitutes an excellent opportunity to meet the consortium and address all issues which are linked to late recruitment and non-eligible fellows. In case of issues, corrective actions should immediately be taken.

2. PARTICIPANTS AND THEIR TASKS

The Coordinator shall agree with the REA on the date, venue and the agenda of the meeting when the following conditions are met:

- The Progress report is submitted as a deliverable (via the continuous reporting tool) at Month 13. The progress report is the basis for the assessment and the discussion during the meeting;

¹ According to article 19.1 of the Grant Agreement (GA)

- All fellows are recruited on time (not later than M12) and all researchers' declarations are submitted via the continuous reporting tool.

- In case of delay in recruitment, the detailed explanations are given in the progress report.

It is recommended to have the meeting between months 13-15. If the above requirements are not met, then the PO must send a reminder to the coordinator via PPGMS before setting a date for the meeting. The PO will then need to decide whether to postpone the meeting or not. If not all fellows are recruited but a big majority is, a meeting could be arranged to meet the already recruited fellows. A tele/video conference with the remaining fellows could then be foreseen to meet the remaining fellows.

The Project Coordinator, the scientists-in-charge, the representatives of the Partner Organisations (if any) as well as all the appointed Early Stage Researchers must attend the meeting.

Checklist for Coordinator and Fellows:

The Coordinator:

- Propose a date and venue for the meeting. The venue should be easily reachable for all participants including REA staff.
- Shall propose a date which coincides with an already planned consortium event/meeting/training.
- Propose an agenda to the Project Officer.
- Submit the progress report through the Participant Portal (PP) via the continuous reporting tool.
- Check that all deliverables due for the period have been submitted via the continuous reporting tool in the PP before the MTC.
- Check that the Researcher Declarations for all recruited fellows are submitted by each beneficiary in the PP (they need to be submitted within 20 days of the recruitment and in any case before the meeting).
Also check that Researcher's Declarations have been updated when applicable.
- Provide all MTM participants including recruited researchers with the informal guidelines before the meeting.
- Organise the logistics for the meeting.
- Co-chair the MTM.
- Present an overview of the progress report and the network's progress and achievements in terms of recruitment and management.
- After the meeting: circulate the REA's feedback to all network partners and arrange for any necessary follow-up.

The Marie Skłodowska Curie fellows:

- Prepare a slideshow and/or a poster to be presented during the MTM meeting, where they will present themselves as well as their project.

3. PROGRESS REPORT

The progress report and the deliverables related to recruitment and management form the basis of the discussions at the MTC meeting. The report should cover the project implementation for the period under assessment.

The progress report must be uploaded as a pdf document under the Deliverables Tab via the continuous reporting tool.

The report should include up-to-date information on the delivery of recruitment months and should justify any deviation between the work expected to be carried out in accordance with the Description of action (DoA) and the work actually carried out. Contingency measures should also be listed in case of important delays or deviations. In case of deviations in recruitment, an updated Gantt chart should also be provided.

4. AGENDA OF THE MEETING

The agenda shall be agreed with the REA Project Officer. The meeting should normally last no more than **a day**.

- 1) **Introduction:** Short introduction by the REA Project Officer and the Project Coordinator (~5 *minutes*) on the purpose of the meeting.
- 2) **Tour de table:** All scientists-in-charge should briefly present their research team and describe their role within the network. Introduction of the Partner Organisations (if any) (~30 *minutes*).
- 3) **REA Project officer presentation:** presentation on the monitoring of project implementation, reporting and purpose of the mid-term check (~20 *minutes*).
- 4) **Coordinator's report:** Presentation of the Network and the progress covering the following aspects (~between 45 and 60 *minutes*):

Management

- Recruitment report;
 - Deliverables;
 - Milestones;
 - Ethical issues, if applicable;
 - Management meetings (activities of the Supervisory board, etc.);
 - Financial aspects (if necessary);
 - Critical implementation risks and mitigation actions;
 - Any proposed re-orientations of the networks' activities.
 - Document management and Open Research Data, if applicable
- 5) **Fellows' individual presentation:** Every fellow funded by the project will present herself/himself, his background and present his/her individual research project (foreseen research, training, secondments, etc.). Scientific results are not expected in the presentations at this stage of the project.
 - 6) **Restricted session with the fellows** (~1 to 3 hours).
 - 7) **Restricted session:** Meeting between coordinator and Project Officer to discuss any issue (~15 minutes).
 - 8) **Feedback and open discussion:** Feedback from the REA Project Officer on the output of the network so far, on possible training areas for future exploitation or the impact on fellows' future careers development (~15-30 minutes).
 - 9) **Site visit (optional):** Review how the host institution is operating to meeting the project objectives.

5. MEETING BETWEEN THE MC FELLOWS AND THE REA REPRESENTATIVE

This meeting is intended to allow the researchers to discuss with the REA representative about their experiences within the Network in terms of training foreseen, supervision arrangements, progress and impact on their future careers. The meeting shall last from 1 up to 3 hours approximately, depending on the number of fellows.

The REA should allow the researchers to decide how they wish to meet with the REA representative: all together or in smaller groups. Should any of the researchers wish to meet bilaterally with the Project Officer, this is also possible upon request.

Expected duration:

- One meeting with all researchers together: 60min/90min approximately
- Smaller groups: 30 min/meeting (3 meetings maximum)
- Individual meetings (upon request): 10 to 15 min /meeting (maximum duration 2 hours)

Main focus will be on:

- 1) **Administration:** Researcher Declarations, Grant Agreement provisions awareness, working conditions (employment contracts, eligible allowances, visa issues, administrative support), tuition fees.
- 2) **Supervision and integration:** Quality of the supervision, integration within the research team/the network/the host institution/ the country.
- 3) **Training:** Effectiveness of the Career Development Plan, individual research projects, secondments, PhD courses, attendance of external courses/workshops/conferences, language courses and complementary skills training.

Should the researchers meet all together with the Project Officer, the ESR representative(s) (if any) may summarize the ESRs' feedback in a couple of slides to briefly present their experience in the network and the project (by highlighting what is positive and what could be improved). Questions could be also collected in advance as a basis for discussion during the meeting.



- It is also recommended to provide all fellows with the [InfoPackage for Fellows](#) prepared by EAC.

The Information note for Marie Skłodowska-Curie Fellows in Innovative Training Networks (ITN) has been published on the MSCA website.

You can consult it at the following link:

http://ec.europa.eu/research/mariecurieactions/resources/document-library_en

The direct link to the document is:

https://ec.europa.eu/research/mariecurieactions/sites/mariecurie2/files/msca-itn-fellows-note_en.pdf

Coordinators were provided with the links and were requested to provide the information to all recruited fellows. Reminding fellows during the meeting of the existence of this package is recommended.

- It is also required to inform the fellows and the coordinator that the [H2020 questionnaires](#) are ready. They are not incorporated in the Participant Portal but can be accessed via the following link:

https://ec.europa.eu/eusurvey/runner/Evaluation_for_MSC_fellows

According to Article 32.1 of the GA, each beneficiary must inform each recruited researcher about their obligation to complete and submit — at the end of the research training activities — the evaluation questionnaire and — two years later — the follow-up questionnaire provided by the Agency.

At the final payment, the submission of these questionnaires will be verified for each project and corrective action will need to be implemented in case of issues. More information on the corrective measures will be provided soon.

6. ISSUES/QUESTIONS TO BE CONSIDERED FOR THE PROJECT ASSESSMENT

Research Training Programme

- Is it in line with the plan as established in DoA?
- 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 multidisciplinaryity 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 Partner organisations 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.)?