Overview of EU Project Management

Giles Brandon (Intelligentsia Consultants), Project Management Training, Friday 28th February 2025

Training Schedule

1. **Module 1: Overview of EU Project Management, 09:00 CET, 28 February 2025**
2. **Module 2: Horizon Europe Project Life Cycle - Initiation Phase + Planning Phase, Time TBD, 28 March 2025**
3. **Module 3: Horizon Europe Project Life Cycle - Execution Phase + Control Phase + Closing Phase, Time TBD, 25 April 2025**

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Today's Agenda

1. **Basics of EU Research Funding Schemes**
2. **Project Lifecycle Overview**
3. **Initiation Phase**
4. **Planning Phase**
5. **Execution Phase / Control Phase**
6. **Closing Phase**
7. **Project Management Methodologies**
8. **Roles and Responsibilities of Project Teams**

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1. Basics of EU Research Funding Schemes

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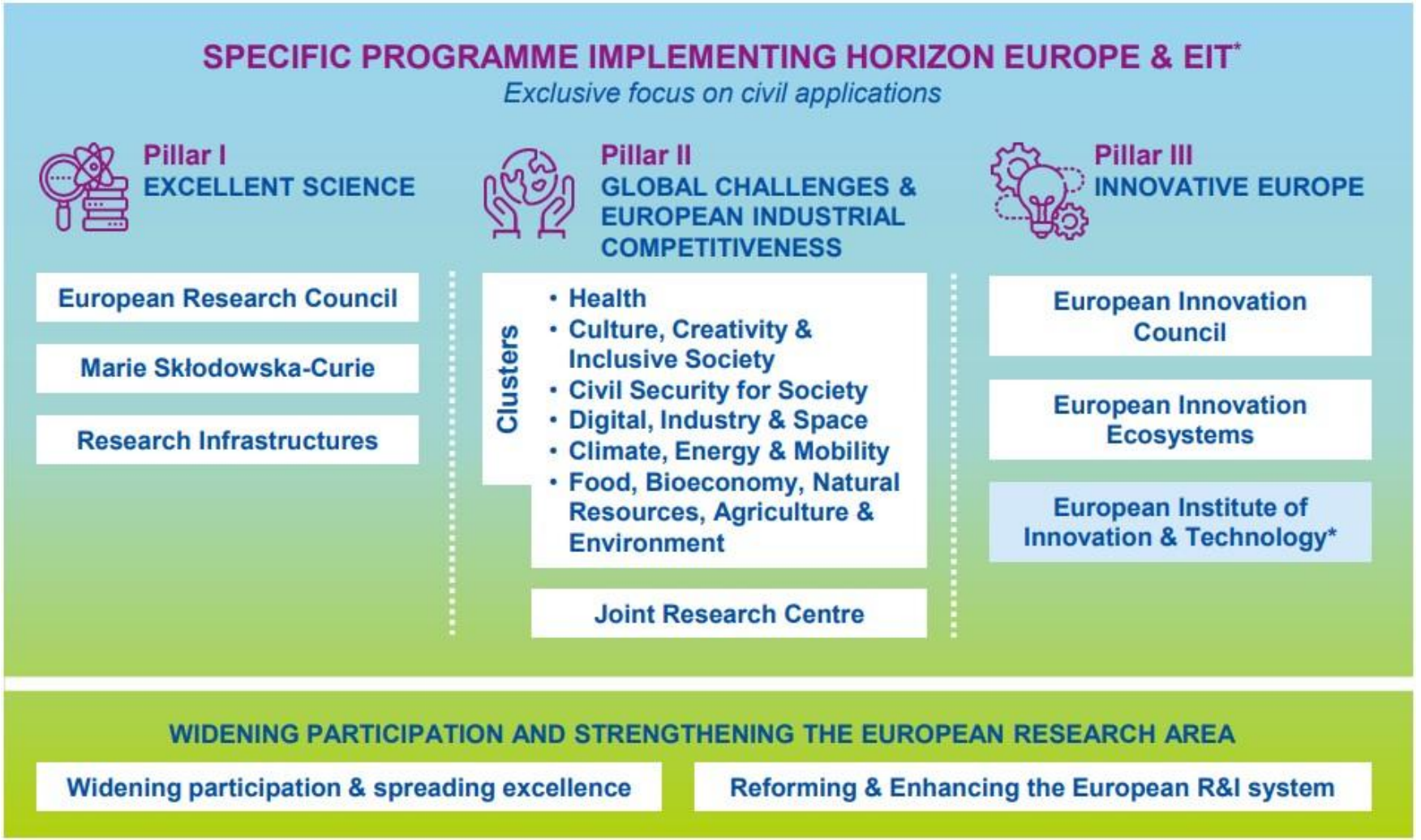
Basics of EU Research Funding Schemes: Horizon Europe

- **Budget:** €95.5 billion
- **Duration:** 2021-2027
- **Structure:** Three pillars: (1) Excellent Science, (2) Global Challenges and European Industrial Competitiveness, and (3) Innovative Europe
- **Support:** Supports a wide variety of projects and initiatives, from fundamental science to close-to-market activities.



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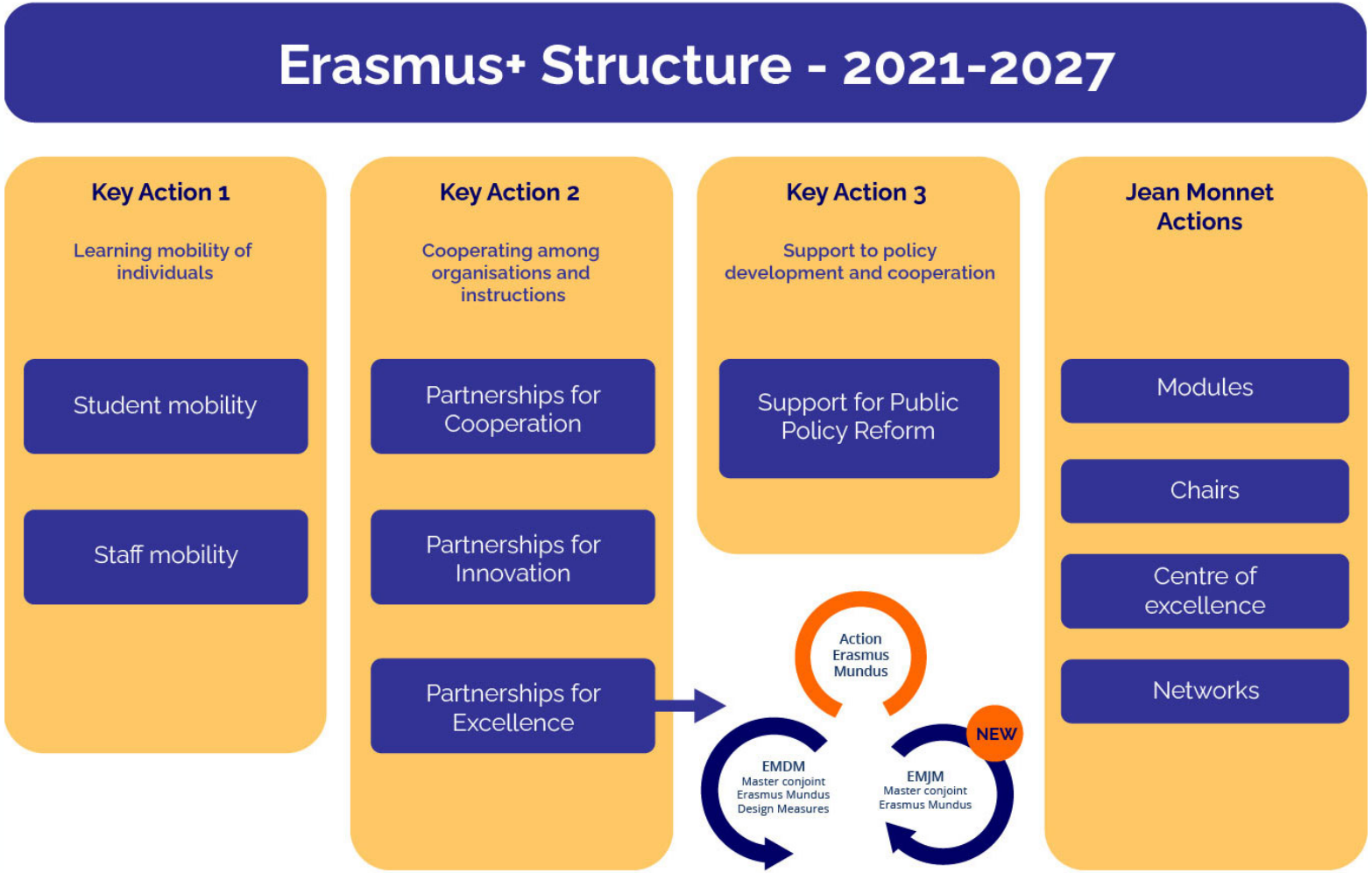
Basics of EU Research Funding Schemes: Erasmus+



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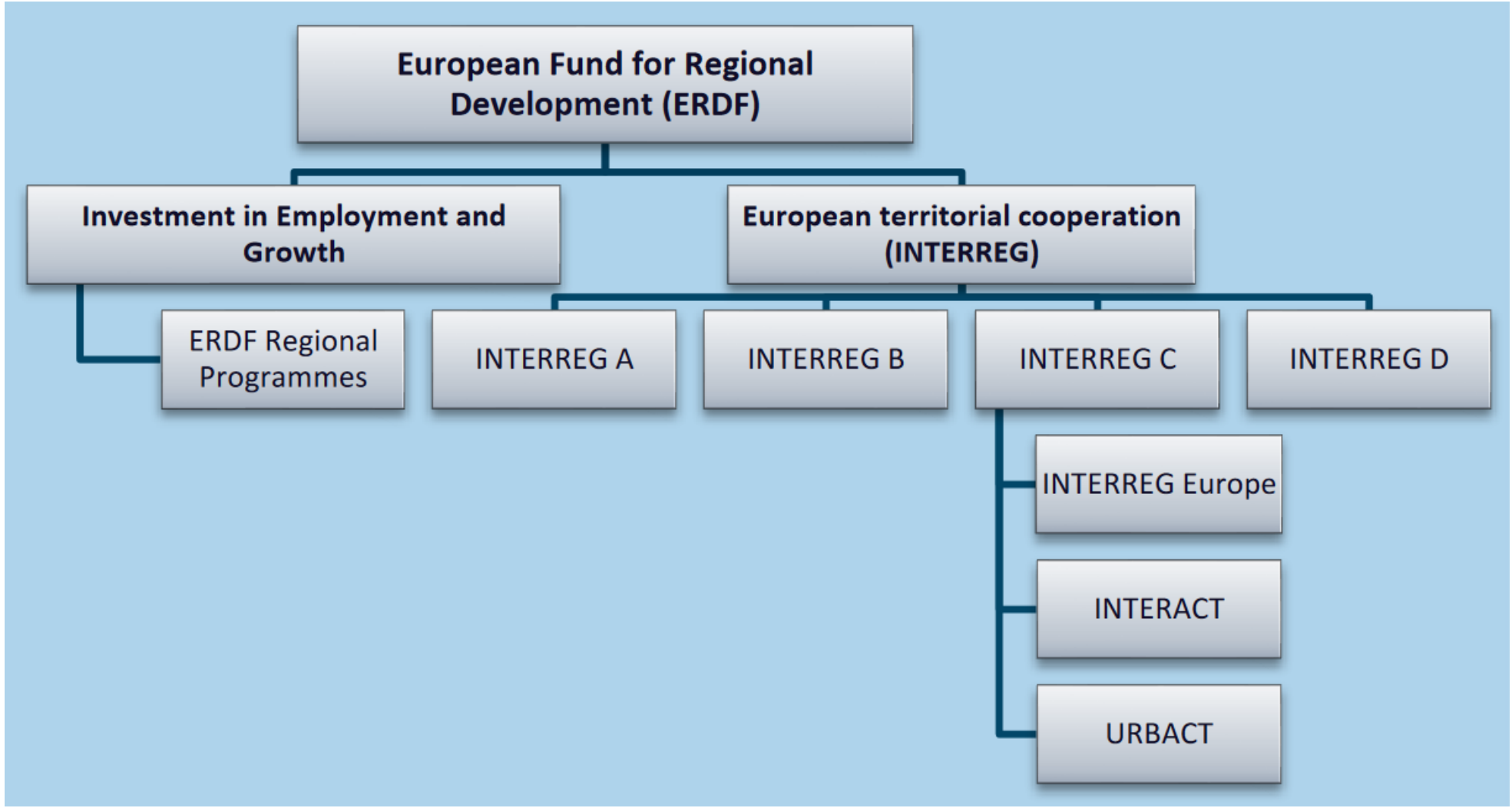
Basics of EU Research Funding Schemes: European Fund for Regional Development



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- **EU Funding Opportunities 2021-2027 – A Practical Guide: https://ec.europa.eu/programmes/erasmus-plus/project-result-content/51b12903-16fe-4dbb-aeec-80c6d404d5fe/EU-Learning_Handbook_EU-Funding%20Opportunities%202021-2027_V5-2021.09.29.pdf**

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Basics of EU Research Funding Schemes: Importance of Project Management

- **Funding Utilisation:** Efficient project management ensures that the funding obtained from EU schemes is used effectively and responsibly, aligning with the proposed budget and reducing wastage of resources.
- **Compliance:** Project management helps in ensuring compliance with the rules and regulations set by the EU for these funding schemes, thus avoiding potential legal issues.
- **Time Management:** Proper project management allows for better time management, ensuring that research activities and milestones are completed within the given timelines.
- **Risk Management:** It helps in identifying, assessing, and managing potential risks that may affect the research project's progress or outcomes, thus reducing the likelihood of failure.
- **Quality Control:** Project management practices can help ensure that the research meets the required quality standards and delivers valuable and valid results.

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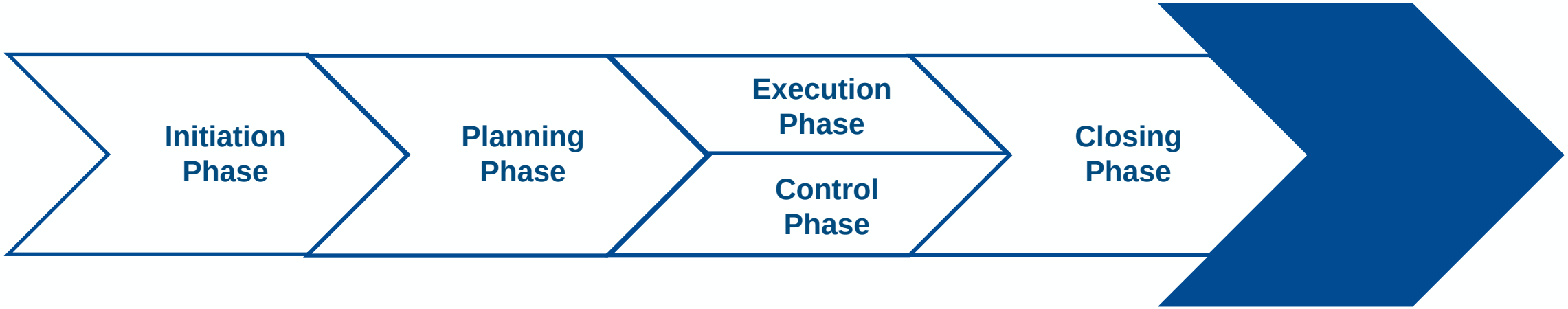
2. Project Lifecycle



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Project Lifecycle Overview: Introduction

- **Project Lifecycle:** The project lifecycle refers to the consecutive stages a project goes through from inception to completion. In the context of EU research funding schemes, it entails the process of developing a research proposal, securing funding, executing the project, and evaluating its outcomes.
  - **Initiation Phase:** This is the stage where a project idea is formalised. In the context of EU funding schemes, this often involves identifying a research question that aligns with the priorities of the specific scheme, putting together a project team, and creating an initial project plan including objectives, potential impacts, and an overview of work packages.
  - **Planning Phase:** The planning phase involves detailing the steps required to achieve the project goals. In an EU research funding context, this phase is crucial to prepare a detailed proposal for submission.
  - **Execution Phase and Control Phase:** Once funding is secured, the project enters the concurrent execution phase and control phase, which involves carrying out the research activities as planned. This includes regular reporting to the EU funding body, as per the scheme's requirements.
  - **Closing Phase:** The closing phase involves finalising all activities, completing the documentation, and disseminating the results. In the context of EU funded research, this often requires a final management report or evaluation to the funding body, demonstrating the achievements and impact of the project.

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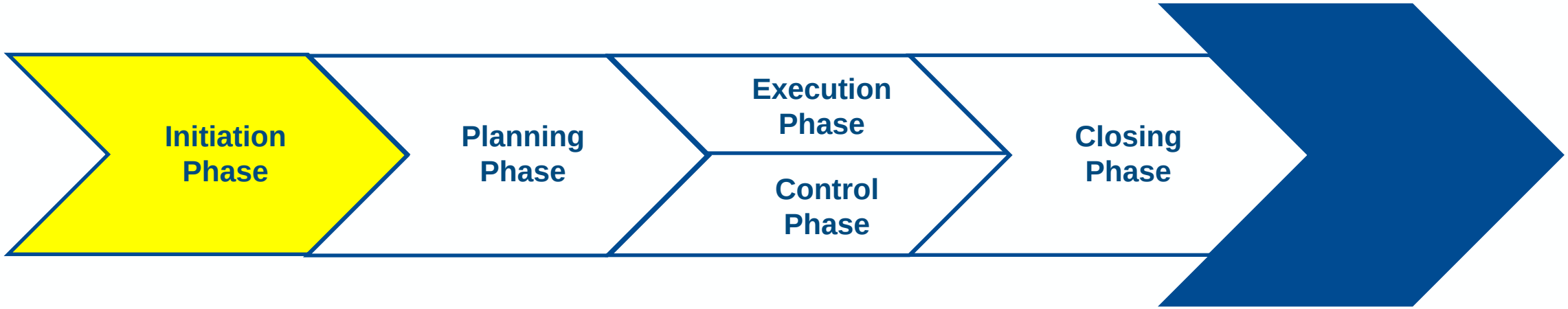
3. Initiation Phase



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Initiation Phase (1 of 7)

- **Determine the project's goals and feasibility:**

  - **Define the Research Question**
    - Identify key bacterial infections where phage therapy shows promise.
    - Determine specific antibiotic-resistant strains targeted.
    - Define measurable safety and efficacy outcomes.
  - **Align with EU Priorities**
    - Contribute to EU's AMR (Antimicrobial Resistance) Action Plan.
    - Support One Health approach integrating human, animal, and environmental health.
    - Advance sustainable and innovative medical solutions.
  - **Assess Technical Feasibility**
    - Evaluate phage selection, production, and administration methods.
    - Identify challenges in phage stability, host range, and resistance development.
    - Ensure compliance with EU regulatory frameworks (EMA, clinical trial guidelines).
  - **Assess Economic Feasibility**
    - Estimate R&D, clinical trials, and production costs.
    - Analyse market demand and reimbursement potential.
    - Consider cost-effectiveness compared to antibiotics.

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Initiation Phase (2 of 7)

- **Identify project stakeholders and their interests:**

  - **Project Team Members:** These are the researchers, scientists, and technical staff involved in the project. Their interests lie in successfully completing the project, advancing their careers, and contributing to their field of study.
  - **Academic & Research Institutions:** Conduct clinical trials and safety/efficacy studies; Advance scientific knowledge on phage therapy; Publish findings and contribute to policy recommendations.
  - **Healthcare Providers & Medical Professionals:** Access alternative treatments for antibiotic-resistant infections; Ensure patient safety and clinical effectiveness; Integrate phage therapy into treatment protocols.
  - **Pharmaceutical & Biotech Companies:** Develop, manufacture, and commercialise phage-based treatments; Ensure regulatory compliance and market access; Assess scalability and cost-effectiveness of production.
  - **EU Regulatory Bodies (EMA, National Agencies):** Evaluate safety, efficacy, and compliance with EU regulations; Provide guidance on clinical trial design and approval processes; Support alignment with AMR policies and One Health strategy.
  - **Policymakers & Public Health Authorities:** Implement strategies to combat antimicrobial resistance (AMR); Support funding and policy incentives for innovative therapies; Monitor public health impact and long-term sustainability.
  - **Patient Advocacy Groups & The Public:** Ensure accessibility and affordability of new treatments; Promote patient-centred approaches in clinical research; Raise awareness about antibiotic resistance and alternative therapies.

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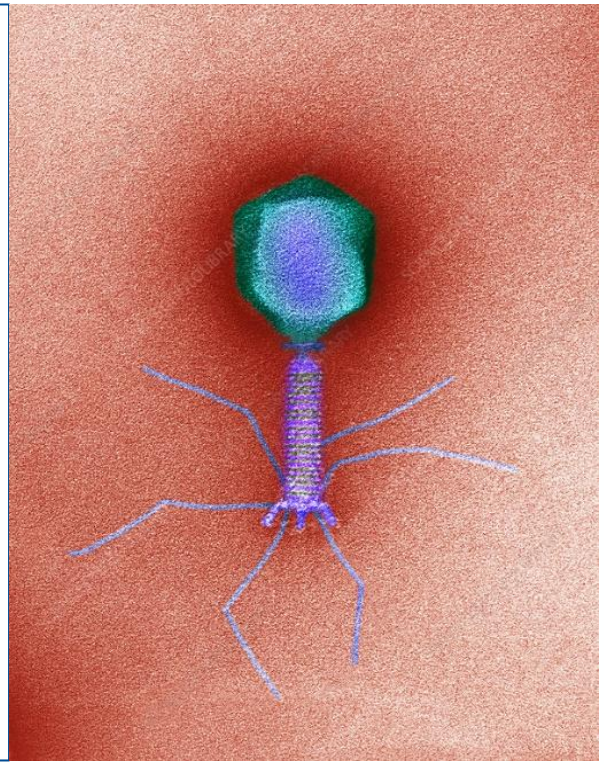
Initiation Phase (3 of 7)

- **Document project initiation by creating a *Project Charter*:**
  - A ***Project Charter*** (also referred to as *Project Abstract*) serves as an informal contract between the project team and the sponsor, and outlines the scope, objectives, stakeholders, and key deliverables of the project.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Project Title:** Phage Therapy for Combatting Antibiotic-Resistant Infections Effectively (PHAGE-CARE)
  - **Project Objectives:** Evaluate clinical safety and efficacy of phage therapy; Address antimicrobial resistance (AMR) challenges; Develop guidelines for regulatory approval and clinical use.
  - **Key Stakeholders:** Project Team; Research Institutions – Conduct trials, analyse data; Healthcare Providers – Implement treatment protocols; Biotech & Pharma Companies – Develop and commercialise therapies; Regulatory Bodies (EMA, EU Commission) – Approve and monitor trials; Patient Advocacy Groups – Ensure accessibility and awareness.
  - **Expected Deliverables:** Clinical trial results on safety and efficacy; Regulatory pathway recommendations; Scalable phage therapy production framework; Scientific publications and policy briefs.
  - **Preliminary Timeline:**
    - Year 1-2: Preclinical studies & regulatory alignment.
    - Year 3-4: Clinical trials (Phase I & II).
    - Year 5: Final analysis, policy recommendations, and commercialisation strategy.



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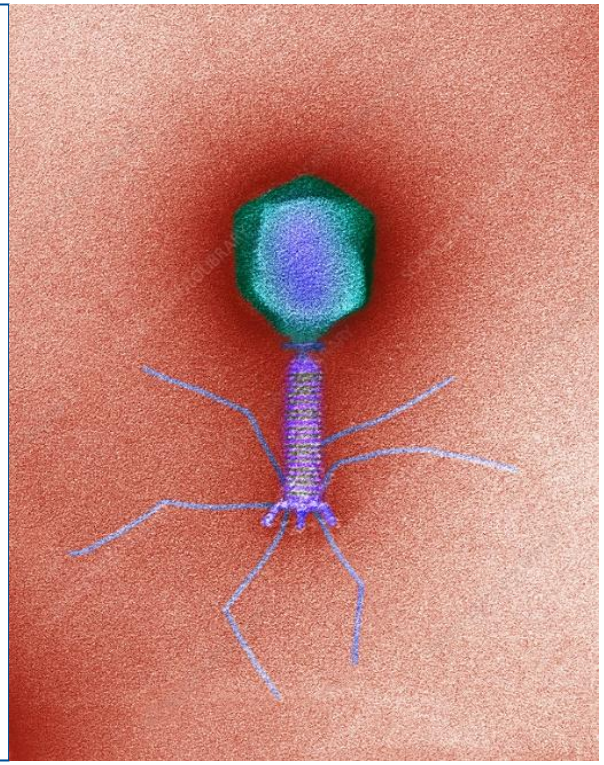
Initiation Phase (4 of 7)

- **Set up initial project team:**
  - Involves identifying key roles, responsibilities, and the skills required to fulfil these roles.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Principal Investigator (PI):** Leads scientific direction and ensures research integrity; Oversees clinical trial design and execution.
  - **Researchers & Clinicians:** Conduct laboratory and clinical studies; Analyse data on phage efficacy and safety.
  - **Project Manager:** Coordinates project activities and milestones; Ensures compliance with Horizon Europe guidelines.
  - **Regulatory & Ethics Expert:** Advises on EMA and EU regulatory pathways; Ensures ethical approval and patient safety.
  - **Dissemination & Communication Manager:** Develops outreach strategy for stakeholders; Publishes findings and manages public engagement.
  - **Industry & Biotech Partners:** Support phage production and commercialisation; Facilitate technology transfer and scalability.
  - **Patient Advocacy Representative:** Ensures patient-centred approach and accessibility; Engages with public health stakeholders.



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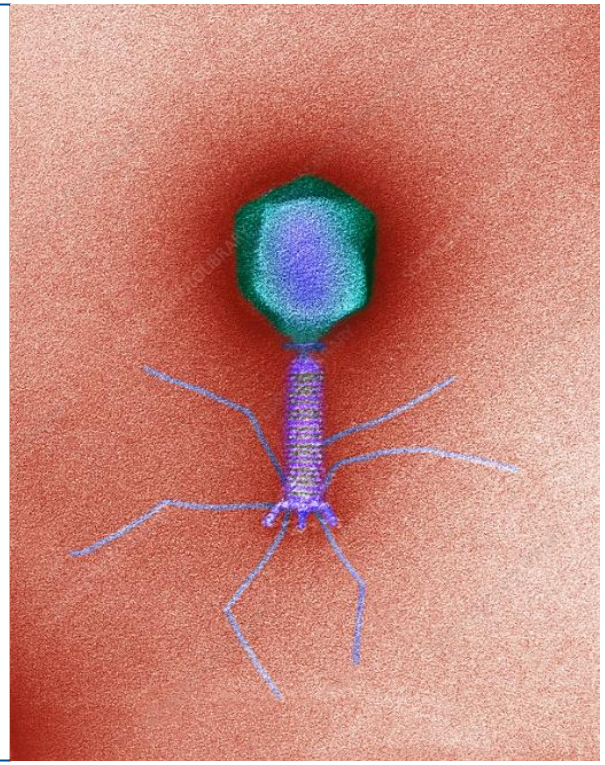
Initiation Phase (5 of 7)

- **Secure initial resources, including funding:**
  - In the initiation phase of EU-funded research projects, securing initial resources is a critical step. This includes funding from EU schemes, but also other resources like personnel, equipment, or facilities.
  - Vital to identify what resources are needed for the project, where these can be obtained from, and how they can be secured in a timely and cost-effective manner.

  - **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
    - **Funding & Budget:** Horizon Europe grant for R&D, clinical trials, and dissemination; Co-funding from industry and biotech partners.
    - **Personnel:** Principal Investigator & Researchers – Lead studies and trials; Clinical Experts & Healthcare Providers – Conduct patient treatments; Regulatory & Ethics Advisors – Ensure compliance and approvals; Project & Data Managers – Oversee coordination and research data.
    - **Clinical & Laboratory Facilities:** Biosafety-approved labs for phage production and testing; Hospital partnerships for patient recruitment and trials.
    - **Technological & Data Infrastructure:** Bioinformatics tools for phage characterisation and resistance tracking; Secure data management system for clinical and regulatory reporting.
    - **Stakeholder & Public Engagement:** Patient advocacy groups for ethical considerations; Industry partners for scalability and commercialisation; Communication strategy for EU policy alignment and dissemination.



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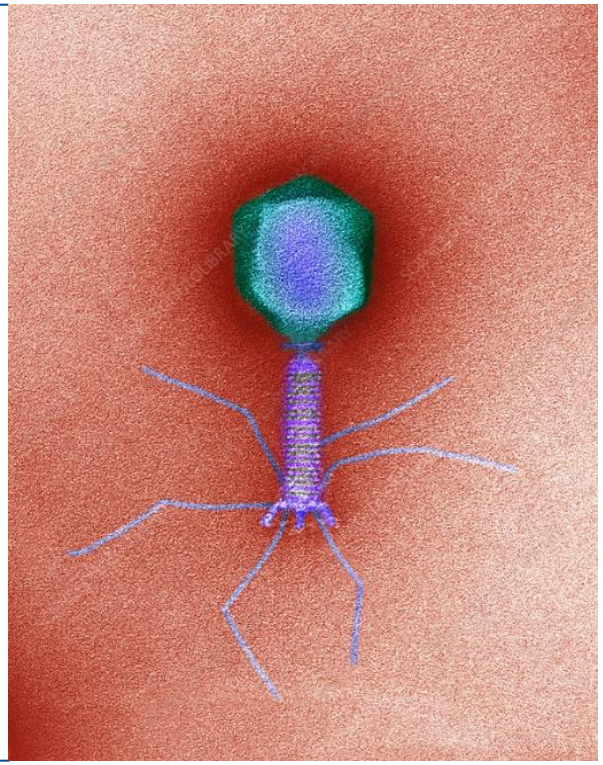
Initiation Phase (6 of 7)

- **Define project deliverables:**
  - In the initiation phase of an EU-funded research project, you define the deliverables that the project is expected to produce. Deliverables will vary based on the nature and scope of the project.
  - Deliverables provide tangible proof of the project's progress and outcomes, which is important for accountability to the funding body, communicating with other stakeholders, and disseminating the results to the wider community.

  - **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
    - **Clinical Trial Results:** Safety and efficacy data from Phase I & II trials; Patient outcomes and response to phage therapy.
    - **Regulatory Pathway Recommendations:** Compliance guidelines for EMA approval; Ethical and legal framework for clinical application.
    - **Scalable Phage Therapy Production Framework:** Standardised phage manufacturing and quality control processes; Industrial scalability assessment for market adoption.
    - **Scientific Publications & Policy Briefs:** High-impact journal articles on research findings; Policy briefs for EU decision-makers and healthcare stakeholders.
    - **Public & Stakeholder Engagement Reports:** Patient advocacy and feedback integration; Dissemination strategy for awareness and education.
    - **Technology Transfer & Commercialisation Plan:** Industry partnerships for phage therapy deployment; Roadmap for future clinical applications and market entry.



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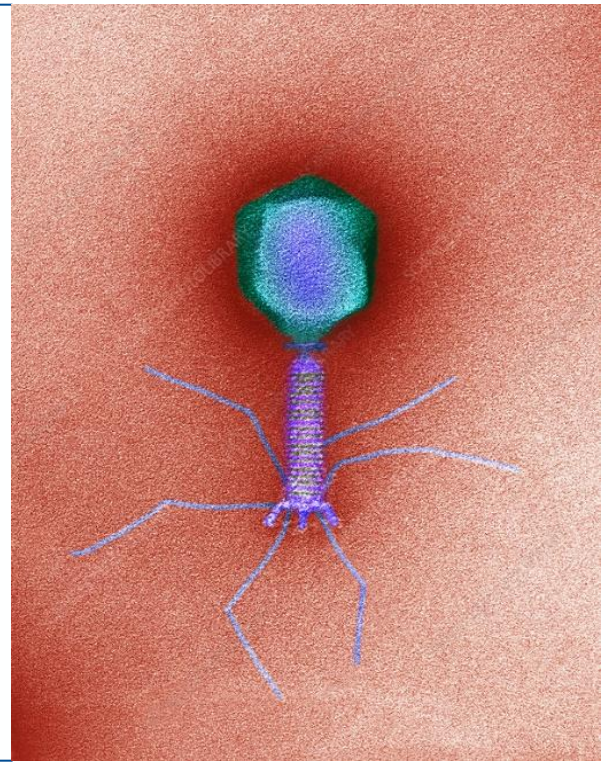
Initiation Phase (7 of 7)

- **Prepare for possible challenges:**
  - During the initiation phase of EU-funded research projects, identifying potential challenges (risks) and developing mitigation strategies is an important step.
  - Identifying challenges early on allows the project team to anticipate them, develop strategies to address them, and thus increase the chances of project success.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Regulatory & Ethical Approval Delays:**
    - Risk: Complex regulatory requirements may slow approval.
    - Mitigation: Early engagement with EMA and ethics boards; adaptive trial designs.
  - **Phage Stability & Efficacy Variability:**
    - Risk: Phage resistance or instability in different environments.
    - Mitigation: Robust screening, formulation optimisation, and combination therapy strategies.
  - **Clinical Trial Recruitment & Patient Response:**
    - Risk: Limited patient pool and variable individual responses.
    - Mitigation: Multicentre trials for diverse recruitment; adaptive dosing strategies.
  - **Manufacturing & Scalability Constraints:**
    - Risk: Challenges in large-scale phage production and quality control.
    - Mitigation: Collaboration with biotech partners for GMP-compliant production.



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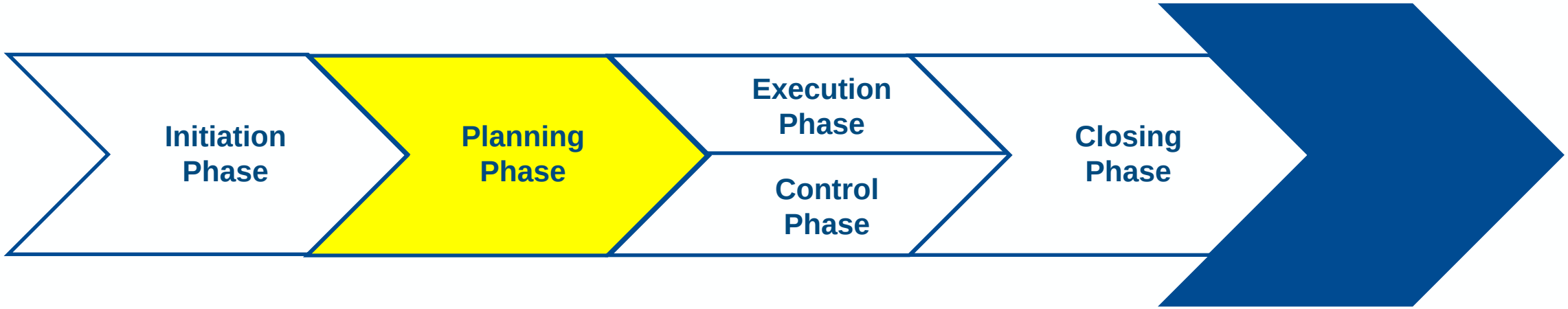
4. Planning Phase



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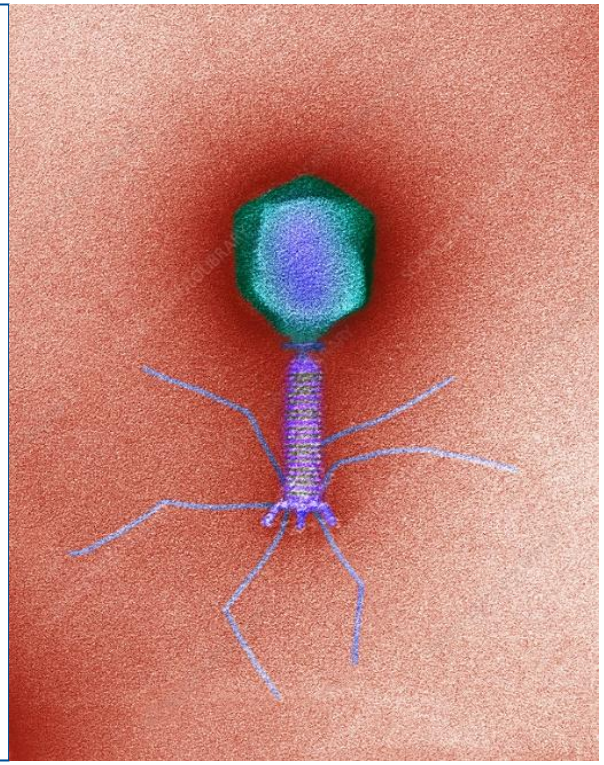
Planning Phase (1 of 3)

- **Develop a detailed project plan:**
  - Developing a detailed project plan is a crucial step in the planning phase of EU-funded research projects.
  - Plan serves as a roadmap for the project, outlining the activities to be performed, the resources required, and the timeline for completion.

  - **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
    - **Work Breakdown Structure (Work Packages):** WP1: Preclinical Research & Phage Optimisation; WP2: Clinical Trials (Phase I & II); WP3: Manufacturing & Scalability; WP4: Dissemination & Policy Recommendations; WP5: Project Coordination & Regulatory Compliance.
    - **Resource Allocation:**
      - Dedicated research teams for lab & clinical studies; Biotech industry partners for production scalability; Regulatory experts for compliance & approvals.
    - **Timeline (Work Package Dates):**
      - Year 1-2: Preclinical research, regulatory approvals (WP1); Year 2-4: Clinical trials (WP2); Year 3-5: Manufacturing scale-up, dissemination (WP3, WP4).
    - **Milestones (Key Dates):**
      - M12: Preclinical results & regulatory approvals; M24: Phase I clinical trial completion; M36: Phase II trial data analysis; M48: Scalable production framework finalised; M60: Policy briefs and commercialisation roadmap.



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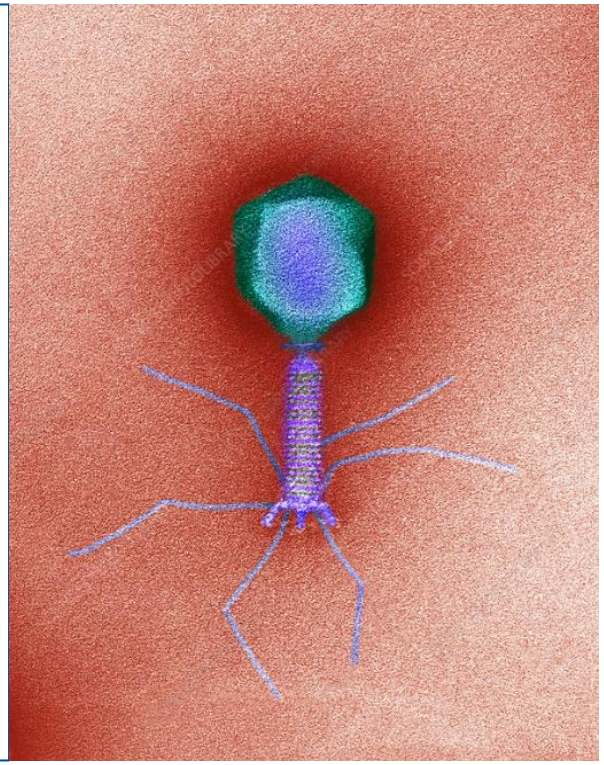
Planning Phase (2 of 3)

- **Set up budgeting and scheduling plans:**
  - Crucial to establish budgeting and scheduling plans. This ensures that the project has the resources it needs to achieve its objectives on time.
  - They also provide a basis for monitoring project performance and accountability to the funding body and other stakeholders.

  - **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
    - **Budgeting Plan:**
      - Cost Categories: Personnel, clinical trials, lab equipment, regulatory compliance, dissemination.
      - Funding Sources: Horizon Europe grant, industry co-funding, public-private partnerships.
      - Cost Estimation: Allocate budget per Work Package (WP) based on resource needs.
      - Risk Buffer: Include contingency funds (5-10%) for unforeseen challenges.
    - **Scheduling Plan:**
      - Project Phases: Preclinical (Year 1-2), Clinical Trials (Year 2-4), Scale-up & Dissemination (Year 3-5).
      - Work Package Integration: Synchronise dependencies between WP tasks.
      - Milestone Tracking: Set clear deliverables at 12, 24, 36, 48, and 60 months.
      - Risk Adjustments: Allow flexibility in case of regulatory or clinical trial delays.
      - Monitoring & Review: Regular progress assessments to ensure timeline adherence.



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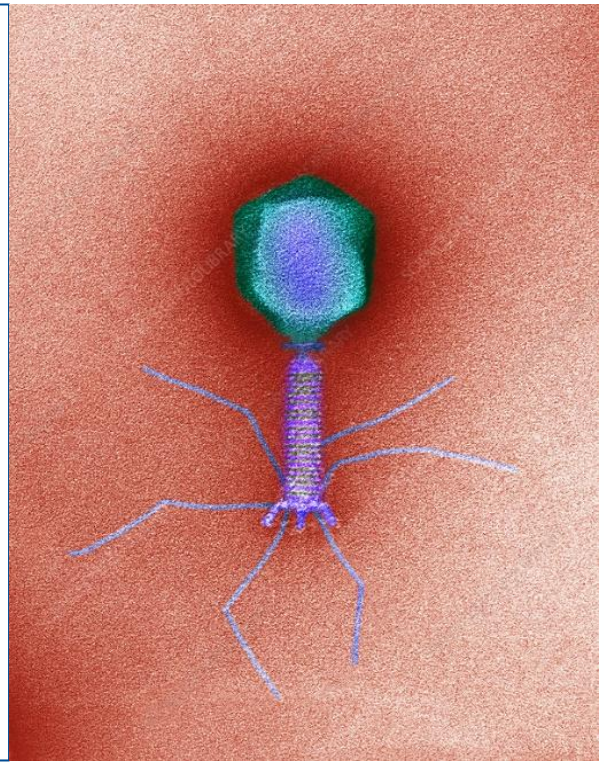
Planning Phase (3 of 3)

- **Define quality metrics and objectives:**
  - Defining quality metrics and objectives during the planning phase of EU-funded research projects is vital to ensure the project meets the expected standards and achieves its goals.
  - Quality metrics and objectives provide a clear definition of what constitutes "success" for the project. They provide a standard against which project performance can be measured and evaluated, which is essential for accountability to the funding body.

  - **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
    - **Scientific & Clinical Key Performance Indicators (KPIs)**
      - Preclinical Success Rate: % of phage candidates showing efficacy in lab models.
      - Clinical Trial Milestones: Completion of Phase I (Month 24) & Phase II (Month 36).
      - Patient Outcomes: Reduction in bacterial load & infection recovery rates.
    - **Regulatory & Compliance KPIs:**
      - Ethical Approvals Secured: Completion by Month 12.
      - Regulatory Submissions: EMA submission by Month 48.
    - **Manufacturing & Scalability KPIs:**
      - Production Yield: Increase in phage batch consistency & quality.
      - Cost Efficiency: Reduction in production costs per phage dose.
    - **Dissemination & Impact KPIs:**
      - Scientific Publications: Number of high-impact journal papers; Policy Engagements: No. EU & healthcare policy briefings.



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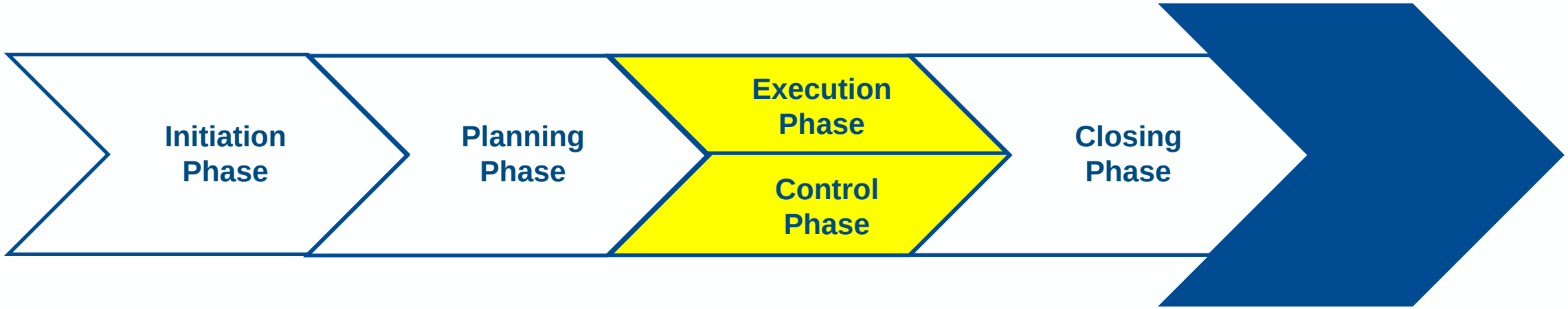
5.1 Execution Phase



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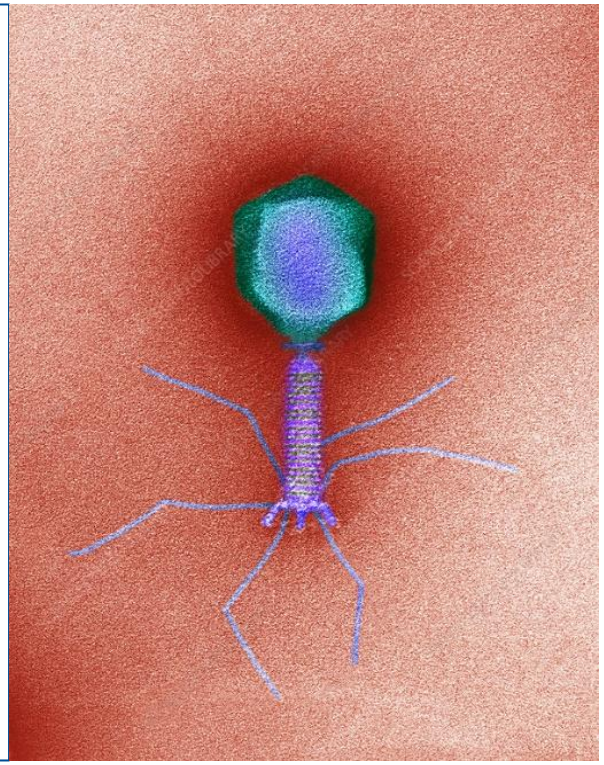
Execution Phase (1 of 3)

- **Deploy resources and execute the project plan:**
  - Resources are deployed, and the project plan is put into action.
  - Involves coordinating people and materials, conducting project activities, and ensuring tasks completed as planned.
  - Busy phase that requires effective coordination, problem-solving, and communication to ensure that the project stays on track and achieves its objectives.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Personnel Deployment:**
    - Year 1-2: Research teams conduct preclinical studies, regulatory experts secure approvals.
    - Year 2-4: Clinicians and trial coordinators execute Phase I & II trials.
    - Year 3-5: Manufacturing specialists optimise large-scale production, dissemination team engages stakeholders.
  - **Equipment Allocation:**
    - Year 1: Laboratory equipment set up for phage screening and formulation.
    - Year 2-3: Clinical trial sites equipped for patient treatment and monitoring.
    - Year 4-5: Industrial-scale production infrastructure established for GMP compliance.
  - **Facility Utilisation:**
    - Preclinical Phase: Research labs for phage selection, efficacy, and safety tests.
    - Clinical Trials: Hospital and healthcare facilities for patient recruitment and treatment.
    - Manufacturing & Scale-Up: Biotech industry partners for GMP production and quality control.



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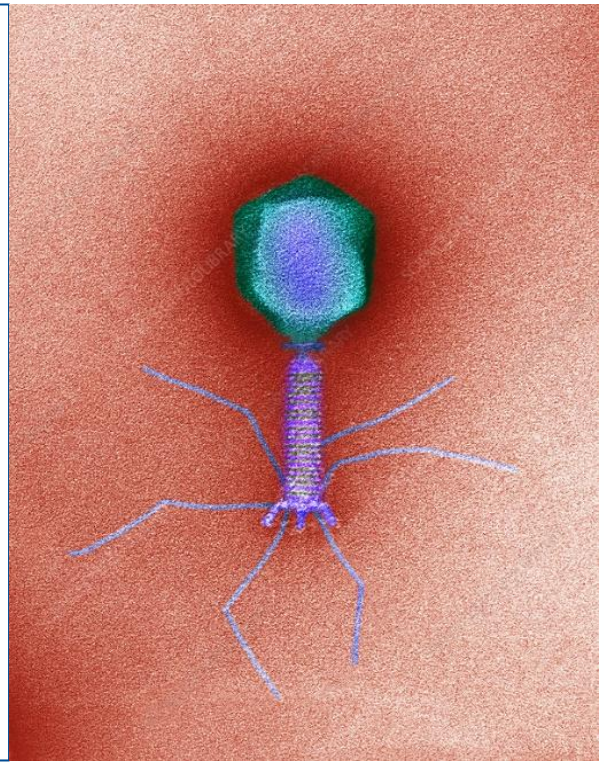
Execution Phase (2 of 3)

- **Manage teams and their tasks:**
  - Involves ensuring that everyone knows what they need to do, coordinating team activities, resolving any issues that arise, and maintaining a productive and positive work environment.
  - Good team management helps to ensure that project activities are carried out effectively, that team members feel valued and motivated, and that any issues are addressed promptly.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Task Allocation:**
    - Assign clear roles based on expertise (research, clinical, regulatory, dissemination).
    - Use a Work Breakdown Structure (WBS) to distribute tasks across work packages (WPs).
    - Implement a Task Management System (e.g., Trello, Asana) for tracking responsibilities..
  - **Performance Monitoring:**
    - Regular Progress Reviews – Monthly team meetings, quarterly reports.
    - Key Performance Indicators (KPIs) – Track clinical milestones, publication outputs, and regulatory approvals.
    - Risk & Issue Tracking – Early identification of delays and corrective actions.
  - **Conflict Resolution:**
    - Clear Communication Protocols – Define reporting structure and escalation procedures.
    - Dedicated Project Manager – Mediates conflicts, ensures alignment with project goals.
    - Consensus-Based Decision-Making – Engage stakeholders to resolve disagreements collaboratively.



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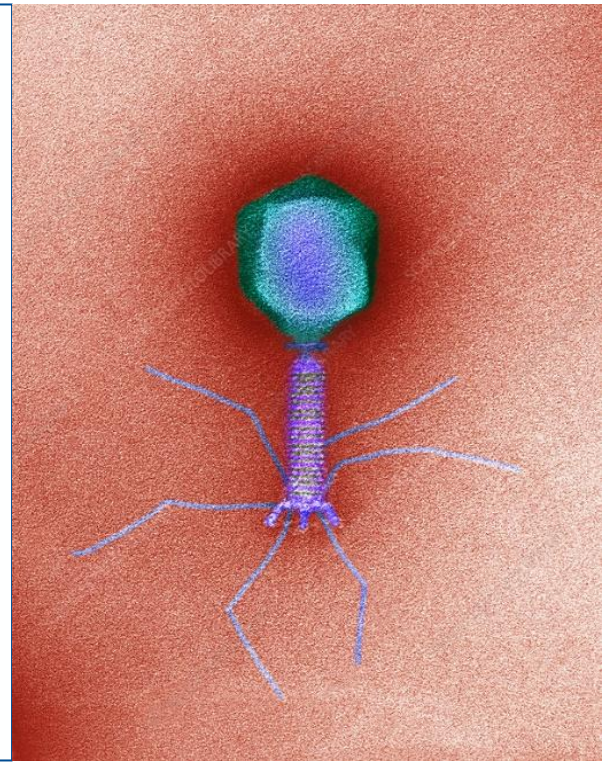
Execution Phase (3 of 3)

- **Implement approved changes:**
  - Implementing approved changes is a common part of the execution phase in EU-funded research projects.
  - Despite careful planning, circumstances can change, new information can emerge, and adjustments may be needed.
  - The process typically involves reviewing and approving the changes, communicating them to all stakeholders, and updating the project plan accordingly.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Methodology Changes:**
    - Update protocols & SOPs in line with regulatory requirements.
    - Communicate changes to research & clinical teams with training if needed.
  - **Facility Changes:**
    - Evaluate facility upgrades for capacity & compliance (e.g., GMP standards).
    - Coordinate with lab & clinical site managers for seamless transition.
  - **Staffing Changes:**
    - Identify skill gaps and recruit specialised personnel if required.
    - Reallocate responsibilities to maintain work package continuity.
    - Provide onboarding & training for new team members.
  - **Schedule Changes:**
    - Update timeline & milestones in the project management system, Communicate adjustments to stakeholders.



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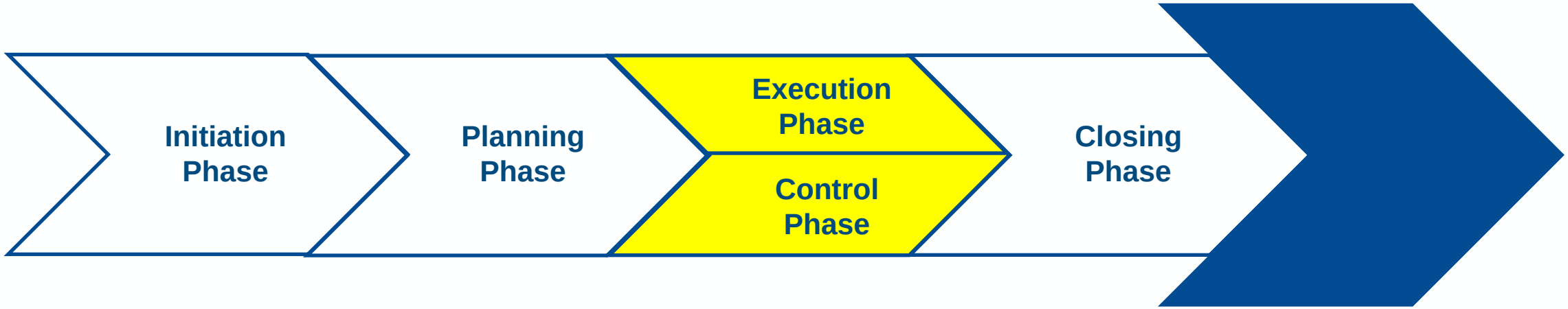
5.2 Control Phase



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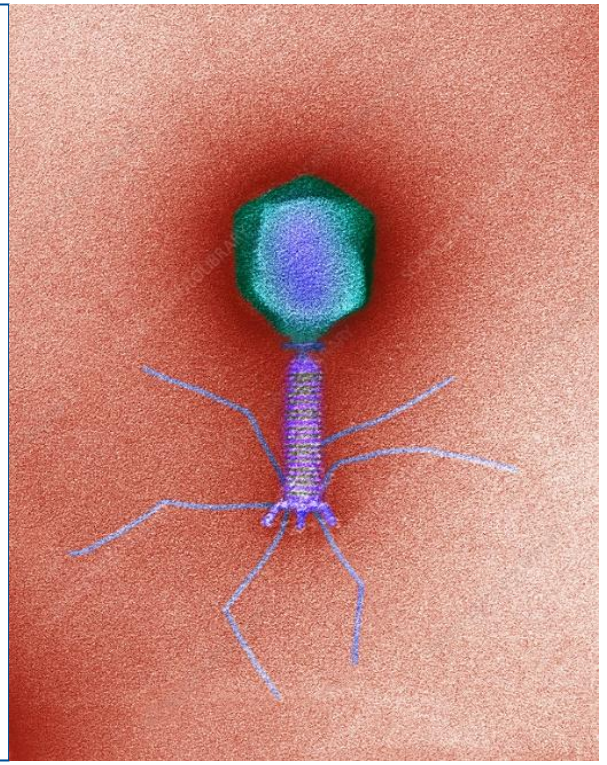
Control Phase (1 of 2)

- **Track, review, and regulate project progress:**
  - Crucial to track, review, and regulate project progress to ensure alignment with the project plan, detect any issues early, and take corrective action if necessary.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Project Dashboard:**
    - Monitors work package completion, milestones, and KPIs.
    - Visual reports on budget spending, resource allocation, and risks.
  - **Clinical Visits & Monitoring:**
    - Regular site visits to ensure adherence to trial protocols.
    - Patient monitoring checkpoints for safety and efficacy assessment.
    - Compliance with Good Clinical Practice (GCP) and regulatory standards.
  - **Status Reports:**
    - Quarterly progress reports covering key achievements and challenges.
    - Six-monthly stakeholder meetings for performance review and adjustments.
    - Periodic Horizon Europe compliance reviews to align with funding requirements.



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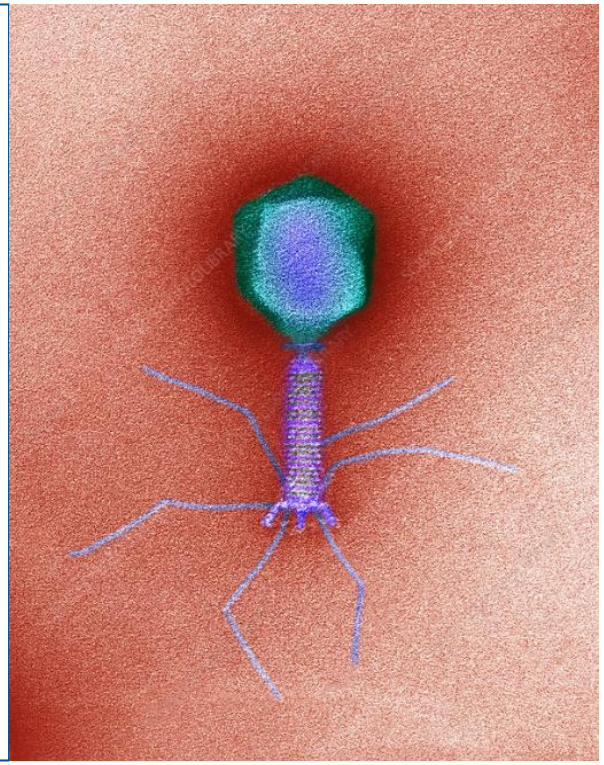
Control Phase (2 of 2)

- **Compare actual performance with planned performance:**
  - Helps to ensure that the project is progressing as expected, identify any deviations from the plan, and take corrective action if necessary.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Timeline Tracking:**
    - Use Gantt charts & dashboards to track milestone completion.
    - Compare planned vs. actual progress on work packages (WPs).
    - Identify delays & bottlenecks early and implement corrective actions.
  - **Budget Comparison:**
    - Monitor expenditures vs. allocated budget per WP.
    - Flag cost overruns or underspending for adjustments.
    - Conduct quarterly financial audits to ensure compliance.
  - **KPIs:**
    - Evaluate clinical trial progression (patient recruitment, treatment success).
    - Assess scientific output (publications, regulatory approvals).
    - Measure dissemination impact (stakeholder engagement, policy adoption).



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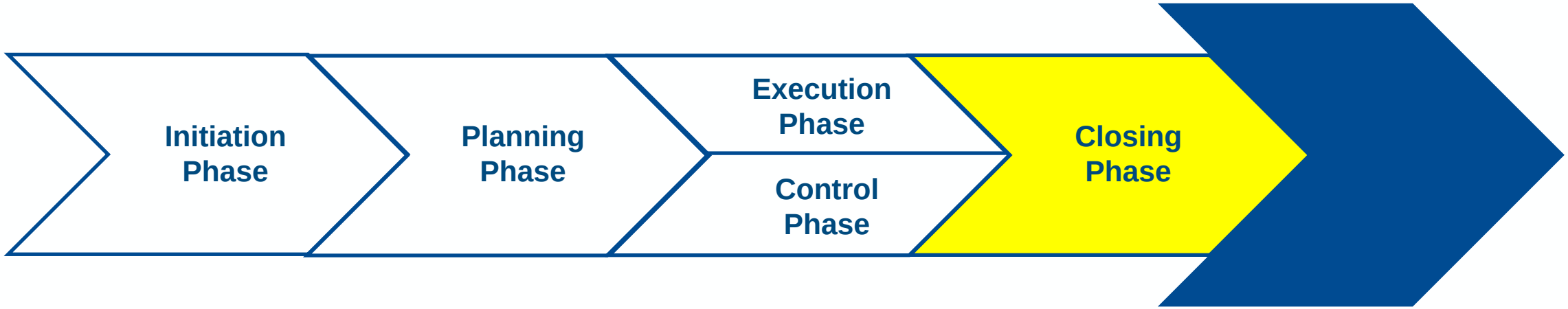
6. Closing Phase



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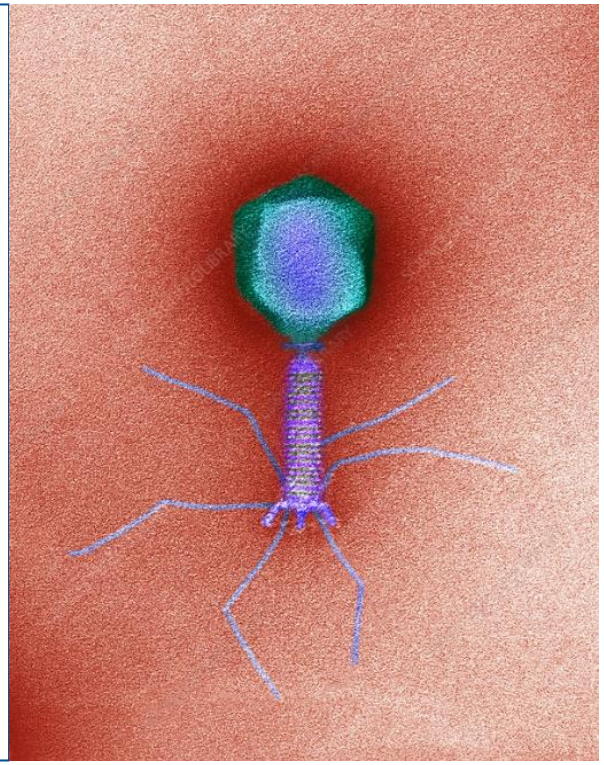
Closing Phase (1 of 3)

- **Deliver the final product or service:**
  - This refers to the final output of the project being ready for use or implementation.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Clinical & Scientific Deliverables:**
    - Final clinical trial results on phage therapy safety & efficacy.
    - Regulatory pathway recommendations submitted to EMA.
    - Scalable phage production framework with GMP compliance.
  - **Knowledge Dissemination:**
    - High-impact scientific publications in peer-reviewed journals.
    - Policy briefs & white papers for EU health authorities.
    - Final stakeholder report summarising project impact.
  - **Public & Industry Engagement:**
    - Final conference/workshop to present findings.
    - Industry & biotech partnerships for commercialisation roadmap.
    - Public outreach & patient advocacy reports to ensure awareness.



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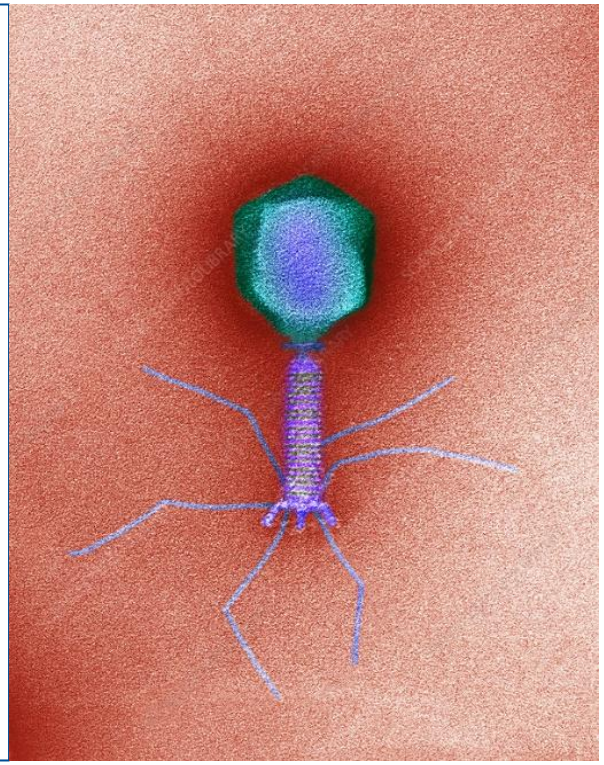
Closing Phase (2 of 3)

- **Release project resources:**
  - Involves ensuring that human, physical, and financial resources that were tied up in the project are properly closed off, redirected or reassigned.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Human Resources:**
    - Final performance reviews & knowledge transfer to future projects.
    - Reassignment or contract closure for temporary research staff.
    - Acknowledgments & professional development support for team members.
  - **Physical Resources:**
    - Decommissioning or repurposing lab equipment for future research.
    - Facility handover & compliance checks for safe project closure.
    - Data archiving & documentation for regulatory and academic use.
  - **Financial Resources:**
    - Final budget reconciliation & financial audits for Horizon Europe compliance.
    - Closure of grants and funding agreements with stakeholders.
    - Reporting of financial expenditures to ensure transparency and accountability.



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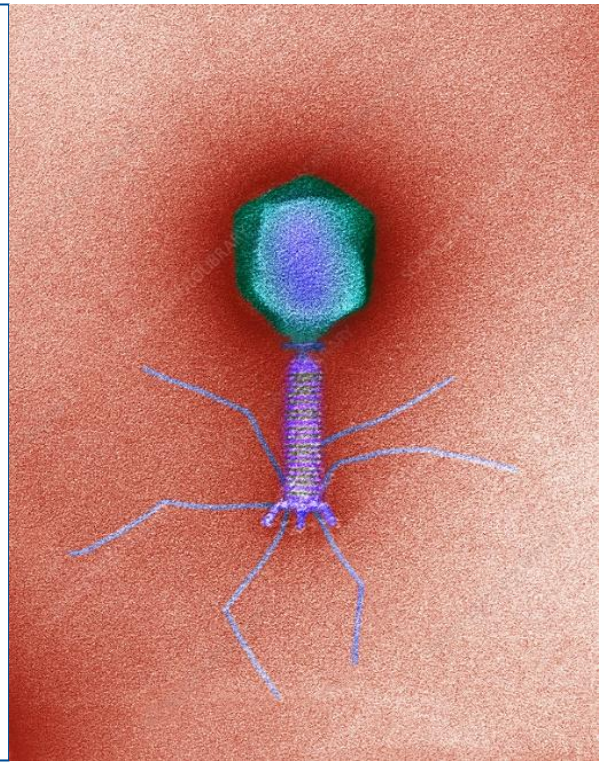
Closing Phase (3 of 3)

- **Document lessons learned:**
  - Involves reflecting on what went well and what could be improved in the future.

- **Case Study: Horizon Europe call for proposals for "Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"**
  - **Scientific & Clinical Insights:**
    - Effectiveness of phage therapy across antibiotic-resistant infections.
    - Challenges in clinical trials (e.g., patient recruitment, regulatory hurdles).
    - Best practices for phage selection & formulation stability.
  - **Financial & Resource Efficiency:**
    - Budgeting accuracy vs. actual costs – areas of over/underspending.
    - Optimisation of resource use (lab facilities, personnel, funding).
    - Funding strategy insights for sustaining future phage research.
  - **Dissemination & Impact:**
    - Effectiveness of outreach strategies to policymakers, industry, and the public.
    - Scientific publication impact and collaboration outcomes.
    - Future directions for phage therapy research & commercialisation..



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7. Project Management Methodologies

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Project Management Methodologies

- **Waterfall Methodology:** This traditional project management methodology is linear and sequential. Each phase must be completed before the next one can begin, making it suitable for projects with clear, unchanging requirements and where tasks are dependent on each other, such as many research projects.
- **PRINCE2 (Projects IN Controlled Environments):** PRINCE2 is a process-based approach that provides a detailed roadmap for how the project should be managed and executed. It's widely used in the UK government and in many sectors and countries worldwide.
- **Agile Methodology:** Agile methodology is iterative and flexible, allowing for regular adjustments throughout the project. Although it's widely used in software development, it can also be applied to research projects, especially those involving complex tasks, rapid changes, or a high level of uncertainty.

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8. Roles and Responsibilities of Project Teams

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Roles and Responsibilities of Project Teams

- **Key Roles in an EU-Funded Research Project Team:**
  - **Project Manager:** Responsible for overall project management, coordination, and delivery of the project on time and within budget.
  - **Principal Investigator:** The lead researcher who is responsible for the scientific and technical direction of the project.
  - **Project Administrator:** Handles administrative tasks such as financial management, reporting, and compliance with EU funding requirements.
  - **Research Associates/Assistants:** Conduct the research tasks under the direction of the Principal Investigator.
  - **Stakeholder Representatives:** Individuals who represent the interests of different stakeholder groups, often providing valuable inputs, feedback, and support.
  - **Dissemination and Communication Officer:** Develops and implements a communication strategy, promotes project results, organises events, engages with stakeholders, and fulfils reporting requirements.

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Homework

- **Homework towards receiving a *Certificate of Project Management*:**

  - **Outline the *Initiation Phase for Your Own Case Study*.**
    - The case study can be on any topic of science and technology – choose a topic relevant to you.
    - Describe the issues to be considered in the *Initiation Phase* – in a similar way as was done for the Case Study on *"Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections"*
      - Describe: Project charter, initial project team, initial resources, project deliverables, preliminary timeline, and possible challenges.

- **Email homework to giles.brandon@intelligentsia-consultants.com**
- **Homework deadline: 14/03/2025**

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Thank You - End of Training Presentation!

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