HI • EURECA • PRO
HERITAGE INNOVATION

MONTAN UNIVERSITÄT LEOBEN

Competitive Proposals: Work Plan & Implementation

From Heritage to Horizon

Successful research proposal writing

Dr Karoline Gritzner
karoline.gritzner@unileoben.ac.at

Funded by
the European Union

1. Work Plan / Work Packages

Section 3 of proposal template Part B: **Quality and efficiency of the implementation**

Quality and efficiency of the implementation – aspects to be taken into account

- *Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall*
- *Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise.*

3.1 Work plan and resources:

- Overall structure of the work plan
- Timing of work packages (e.g. Gantt chart)
- Detailed work description (WPs list & descriptions, deliverables, milestones, critical risks, persons/months, subcontracting costs, equipment costs)

Funded by
the European Union

Table 3.1a: List of work packages

Work package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month

Table 3.1b: Work package description

For each work package:

Work package number	
Work package title	

⚠ *Participants involved in each WP and their efforts are shown in table 3.1f. Lead participant and starting and end date of each WP are shown in table 3.1a.)*

Objectives

Description of work (where appropriate, broken down into tasks), lead partner and role of participants. For each task, quantify the amount of work. Provide enough detail to justify the resources requested and clarify why the work is needed and who will do it. Deliverables linked to each WP are listed in table 3.1c (no need to repeat the information here).

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

Work Package No	Work Package name	Lead Beneficiary	Effort (Person-Months)	Start Month	End Month	Deliverables
WP1	Project Management, Quality Control and Ethics (M1-M16)	1 - TUC	16.30	1	16	D1.1 – Methodological framework for the evaluation and monitoring of Demo Sites D1.2 – Data management plan v1
WP2	Project Management, Quality Control and Ethics (M17-M32)	1 - TUC	13.80	17	32	D2.1 – Demo sites evaluation report v1 D2.2 – Data management plan update v2
WP3	Project Management, Quality Control and Ethics (M33-M48)	1 - TUC	16.90	33	48	D3.1 – Demo sites evaluation report v2 final D3.2 – Data management plan update v3

Work Package (WP1):

- Link WPs to project objectives
- Task description (T1.1, T1.2, …)
- Task lead + contributors (XX)

Work package WP1 – Project Management, Quality Control and Ethics (M1-M16)

Work Package Number	WP1	Lead Beneficiary	1. TUC
Work Package Name	Project Management, Quality Control and Ethics (M1-M16)		
Start Month	1	End Month	16

Objectives

- to provide sound administrative and financial coordination, ensuring that project objectives are efficiently and effectively met in accordance with the work plan, timeline and quality standards;
- to establish a robust monitoring system for the implementation/progress of research and innovation activities
- to provide flawless reporting and effective communication within the project and towards the EC;
- to monitor potential risks and timely apply contingency measures.

Description

T1.1 Administrative, legal and financial management (TUC)
The Project Coordinator (PC), TUC, will hold the overall contractual responsibility towards EC and will implement the general administrative and financial project coordination in accordance with the Grant Agreement and the Consortium Agreement (CA) which will include detailed terms of management and of the ownership and access to key knowledge (IPR, research data etc). Progress reports will be prepared, with the WP leaders' contributions. T1.1 deals with the 1st Progress report and includes the day-to-day management and monitoring of the implementation progress and compliance compared to the original work plan, the smooth resolution of any administrative or contractual issue and any conflict amongst the partnership. The project's Steering Committee will be formed by assigned representatives (one per partner HEI).

T1.2 Technical coordination and quality control (TUC)
TUC will set up a secured collaborative internet platform (i.e. sharepoint, Teams) for project management. Multiple

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

Table 3.1c: List of Deliverables[2]

Only include deliverables that you consider essential for effective project monitoring.

Number	Deliverable name	Short description	Work package number	Short name of lead participant	Type	Dissemination level	Delivery date (in months)

D13.1	Mapping needs in international collaboration	WP13	4 - MUL	R — Document, report	SEN - Sensitive	14
D13.2	Recommendation Paper on institutional reform	WP13	4 - MUL	R — Document, report	SEN - Sensitive	30
D13.3	Best-practice models of research collaboration	WP13	4 - MUL	DATA — data sets, microdata, etc	PU - Public	46

D13.1 = first deliverable from WP13

Type:
R – Document, report
DEM – Demonstrator, pilot, prototype, plan design
DATA – Data sets, microdata, etc.

Dissemination level:
PU – Public, fully open, e.g. web
SEN – Sensitive, limited under the conditions of the Grant Agreement

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

2. Designing the Work Plan

- Start with the **objectives**, not the work packages
  - What are your 4–6 project objectives?
  - What evidence or innovations are needed to achieve each objective?
  - What major strands of work are required?

- Then ask: **How should these strands be organised into work packages?**

- Useful rule: **every work package should answer one overarching question.**

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

E.g. a climate adaptation and cultural heritage proposal:

WP1: How can the project be coordinated to ensure scientific excellence, effective collaboration, ethical research and the timely delivery of its objectives? "Project coordination & quality assurance"

WP2: How do we understand the challenge? How do climate hazards affect the vulnerability and resilience of cultural heritage across different environmental and material contexts? "Climate risks, heritage vulnerability and baseline assessment"

WP3: How can heritage values, local knowledge, stakeholder needs and governance arrangements be integrated into the co-design and implementation of socially legitimate climate adaptation strategies? How do we develop the solutions? "SSH research, co-design and adaptation governance"

WP4: How do we test and validate? Which technological / innovative solutions can effectively reduce climate-related risks to cultural heritage while remaining compatible with heritage materials and site-specific conditions? "Development and testing of innovative adaptation solutions"

WP5: How can project knowledge be communicated for wider uptake of climate adaptation solutions for cultural heritage? "Communication, dissemination, training and capacity building"

Funded by the European Union

The WPs tell a coherent story rather than simply grouping similar activities.

- Design the project as a **narrative**
  - Challenge -> Knowledge generation -> Innovation -> Testing -> Validation -> Adoption -> Impact
- **Logical organisation** of the project
- Ensure every work package has a clear purpose. **Each WP should have:**

- clear objectives
- a coherent set of tasks
- related activities
- defined outputs (deliverables)
- measurable results
- identifiable contributions to project impacts

Funded by
the European Union

- A good work plan shows **how one WP enables the next**.
- Ensure **each WP contributes to the project's outcomes**
  - Not every WP needs direct societal impact, but each should contribute to the overall pathway. For example:
  - Research WP -> produces knowledge
  - Development WP -> produces innovation
  - Pilot WP -> produces evidence
  - Training WP -> builds capacity
  - Exploitation WP -> supports uptake

Each WP has a distinct function.

Funded by
the European Union

- **Interdisciplinarity**
  - Integrate disciplines rather than separating them (e.g. engineering, SSH, AI …)
- Make **stakeholder engagement** part of the work plan
  - Co-creation rather than consultation at the end
- Distinguish deliverables from milestones
  - Deliverables answer: What document, tool or product will be produced?
  - **Milestones** answer: **What significant achievement allows the project to move forward?**
  - E.g., Milestone: Stakeholder Advisory Board established

Table 3.1d: List of milestones

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification

Means of verification:
➢ Show how you will confirm that the milestone has been attained.

Milestone No	Milestone Name	Work Package No	Lead Beneficiary	Means of Verification	Due Date (month)
12	Reference library and good practices in Industrial, Mining and Cultural Heritage	WP10	3-UP	Library, photos, reports, content.	12
13	Full operation of the HI-EURECA-PRO digital forum and transferability toolbox	WP11	7-ULE	Tools available, reports, etc.	42
14	Knowledge Transfer and Valorisation-three Demo sites	WP12	8-UH	Coach events delivered, reports, photos.	46
15	Sustainable intern. and interdisciplinary research collaborations between Widening universities, alliance partners and external bodies are established and operational	WP13	4-MUL	Reports, MoUs, messages, new projects, new proposal submissions.	46

Funded by the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

3. Implementation

Implementation means explaining **how the project will be carried out successfully**: how the work is organised, who will do it, which resources and methods are needed, how progress will be monitored, and how potential risks will be managed.

Implementation covers:

- **Work plan**
- **Consortium** (right expertise, roles and facilities?)
- **Resources** (budget, staff effort, equipment?)
- **Methodology in practice** (how will the actions be conducted?)
- **Management and risk** (how will the project be coordinated, quality assured and adapted if problems arise?)
- **Feasibility** (is the proposed work realistic within the project duration?)

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

Implementation statement for a climate adaptation and cultural heritage proposal:

“The consortium establishes pilot-site baselines through collaboration with heritage professionals, local communities and other relevant stakeholders; co-produces adaptation methods by integrating scientific evidence, technical expertise and local knowledge; tests and validates solutions at selected sites; allocates responsibilities to the relevant partners; and monitors progress, stakeholder engagement and risks throughout the project.”

Funded by
the European Union

HI • EURECA • PRO
HERITAGE INNOVATION

What makes a strong Horizon Europe proposal?

- not simply about combining excellent technologies and research disciplines, but developing a shared vision of change.
- builds a credible pathway from knowledge to action.
- *The key question is not only what we can technically develop, but how we ensure that our solutions respond to real needs, are shaped with the people concerned, and make a lasting difference beyond the lifetime of the project.*

Funded by
the European Union