

**Preparing for a smooth
project start:
Internal Kick-Off Meetings**

**King's College
London**

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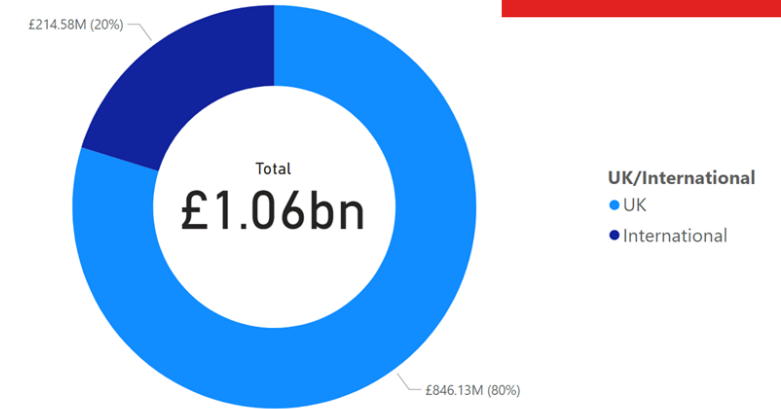
**Jessica Baralt
Research Grants Manager (International)**

King's College London overview

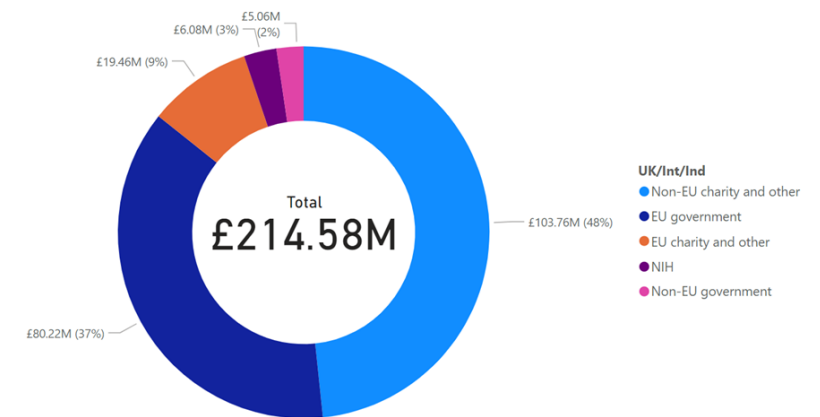


- The Pre- and Post-Award International teams are responsible for European Commission and US Government funded grants
- King's was a beneficiary on over 250 Horizon 2020 grants
- We have approximately 80 active EC grants and another 80 funded through the UKRI Horizon Europe Guarantee, plus over 50 US government funded grants (primarily funded by the National Institutes of Health)

Active Grants

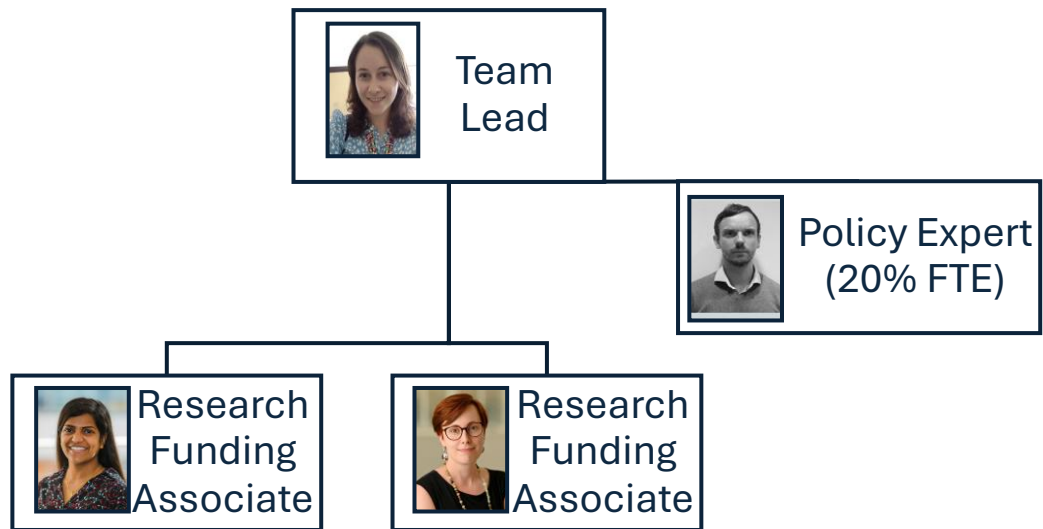


International funding breakdown



International Team Structure

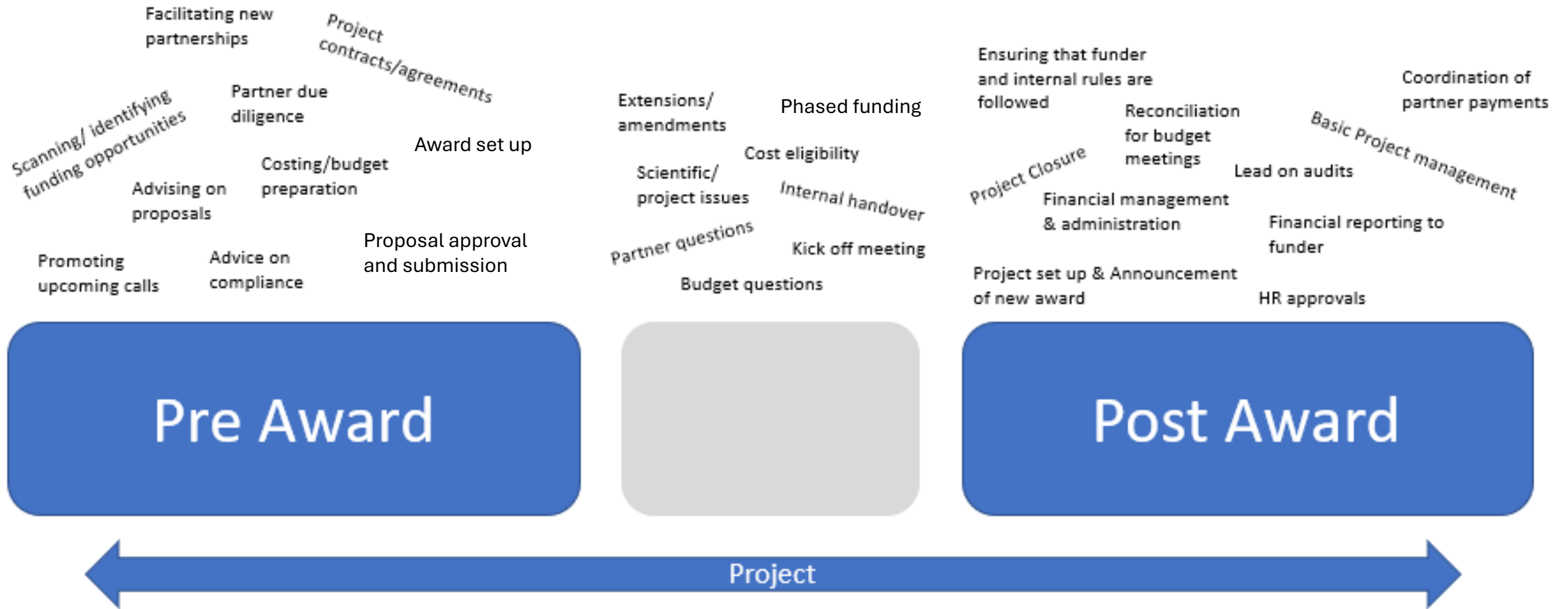
Pre-Award



Post-Award



What do we mean by Pre-Award and Post-Award?



Internal Kick-off meetings

- The purpose is to:
 - Enable a smooth handover from Pre-Award to Post-Award
 - Introduce the PI to key contacts and explain who is responsible for what
 - Explain Post-Award and funder requirements to the PI
 - Make sure the PI is familiar with relevant internal institutional policies and requirements

Kick-off Meetings Process



The Post-Award team arrange a kick-off meeting in time for the project start date.



The PI, department administrator, project manager if applicable, Pre-Award liaison and Post-Award liaison should all attend. Note that this is for internal staff only.



In some cases, PIs who have prior experience with the funder will not require a kick-off meeting, although we always recommend it for all EC and US government funded grants.



An hour is scheduled in case of queries.



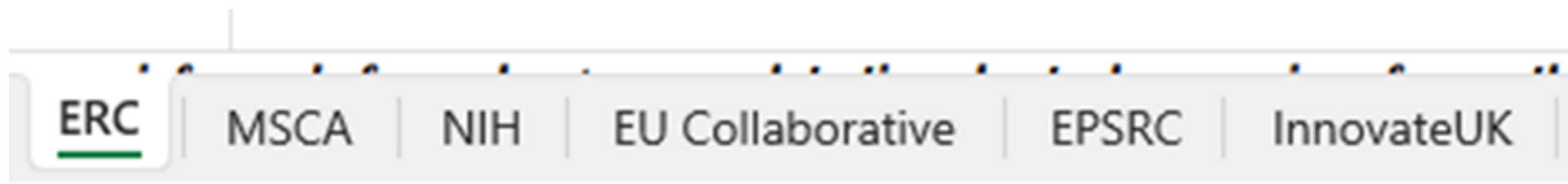
Pre-Award and Post-Award use their shared checklist to guide the PI and their team through the meeting, and the checklist is shared after the meeting.




We have a different checklist for specific funders/schemes.

Grant Types

We have a different checklist for each grant type:



Pre-Award Kick-off checklist

	PRE-AWARD	Tick or N/A
1	Introductions: Post award liaison, Pre/Post-award team and their roles during lifetime of project	<input type="checkbox"/>
2	Dissemination: the European Commission must be acknowledged on all forms of dissemination, and the EU flag should be displayed. This can be found in Clause 17 of the Grant Agreement and in row 15 below. All publications should be open access.	<input type="checkbox"/>
	 <p>Funded by the European Union</p> <p>"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Council. Neither the European Union nor the granting authority can be held responsible for them."</p>	
3	Amendments: contact Pre-award Liaison regarding any planned amendments prior to contacting the coordinator and/or Project Officer <i>Follow up with a request to update project record using extend or supplement buttons</i>	<input type="checkbox"/>
4	Subcontracts & Consultancy Agreements: procedures for each explained inline with KCL procurement rules. <i>Please request agreements via project record contracts tab</i>	<input type="checkbox"/>
5	MTA/DTA Agreements: Contracts team will assist in completing these agreements <i>Please request agreements via project record contracts tab</i> https://internal.kcl.ac.uk/innovation/grants-contracts/contracts/contractsteamcontacts	<input type="checkbox"/>
6	Intellectual Property: contact the IP & Licensing department if you think that any IP generated by the project could be commercialised <i>Pre-award or Post-award contact can give you details of relevant IP partner</i> https://www.kcl.ac.uk/research/work-with-kings/ip-licensing	<input type="checkbox"/>
7	Deliverables and continuous reporting: Please refer to EC portal to ensure deliverables are uploaded in a timely manner and liaise with coordinator, this includes Ethics deliverables.	<input type="checkbox"/>

Post-Award Kick-off checklist

	POST-AWARD	
8	Exchange Rate: rate explained, arrangements for handling exchange rate gain/losses outlined <i>Possible revision at penultimate report subject to underwriting</i> https://www.ecb.europa.eu/stats/policy_and_exchange_rates/euro_reference_exchange_rates/html/eurofxref-graph-gbp.en.html	
9	Budget and Balances: Can be accessed via Worktribe and Business World, however contact us if you need projections on commitments https://internal.kcl.ac.uk/worktribe/index https://internal.kcl.ac.uk/about/ps/finance/kfin/reports/reports <i>See R01 Research Expenditure Overview</i>	
10	Reconciliation: <i>Template and differences between KFIN/Worktribe and Reconciliation file balances</i> <i>check commitments report</i> <i>Please refer to the RACI matrix to identify the task's owner.</i>	
11	Personnel: explain staff authorisation procedure, keep Post-award informed about any changes <i>Consultancy: only if paid hourly rate and fulfil all criteria with contract with individual in place (esp. King's ownership of results)</i> <i>Temp/Agency staff: Other direct cost and procurement required if not preferred supplier (avoid KTB- department must cover the admin fee cost)</i>	
12	Visa Cost: explain eligibility of the cost	
13	Time Recording: outline timesheet requirements, timesheet demonstration <i>Timesheet requests will be sent via Worktribe Milestones, use WT Comments (part of audit)</i> <i>Audit will require independent records of annual leave/sick leave etc.</i> <i>Absent for more than half the month cost may not be eligible (esp. sick leave) if staff exclusively on the project</i> <i>please complete timesheets monthly and send to us quarterly - (digital signature is accepted - please see instruction in the template)</i>	

14	Absence records: all staff needs to keep absence records <i>Suggested platforms: PXD, Google Calendar, Leave cards (part of the compliance with international funders)</i>	
15	Students: only if studentship in original application & ERC, tuition fee not eligible, max 25k allowable stipend rate <i>Others: students working on EU contracts likely to need to be engaged via part-time employment contract - not King's Talent Bank</i>	
16	Direct/Indirect Costs: Explain distinction, provide examples of ineligible direct costs <i>We are expected to have the basic infrastructure in place to do the research</i>	
17	Equipment: explain depreciation rules and implication for funding equipment <i>Requirement to keep usage logs or evidence used exclusively on the project</i>	
18	Travel: Highlight KCL travel policy, travel time to be recorded against the project on the timesheets <i>Evidence supporting the travel/event/meeting as being related to the project. At audit need evidence confirming attendance. Highlight Post Award supporting documents. One travel per expense claim, one person per expense claim.</i> https://internal.kcl.ac.uk/about/ps/procurement/suppliers/travel	
19	Documentation: copies of expense claims, purchase card receipts, internal charge statements etc. to be retained <i>EC can audit up to 5 years after the end date of the project</i>	
20	Internal charges: large and small research facilities (usage statements will be needed). Ask for a list of facilities that is planned to be used <i>Internal catering charges are not allowed to be charged against the project - please use outside catering. - explain the reason behind</i> https://emckclac.sharepoint.com/sites/RMrf/SitePages/King%27s-Research-Facilities.aspx	
21	Procurement: outline KCL financial procedures on procurement (especially getting quotes) Keep copy of the Record of Quotation & Supplier Selection Form and quotes - Add the information to the requisition in KFIN https://internal.kcl.ac.uk/about/ps/procurement/purchkings/procurement-procedures <i>We highly recommend to have a dedicated staff to take the responsibility to sign the POs, check supplier status, delivery notes</i>	
22	Reporting: both on EC and UKRI portals intervals and requirements outlined	
23	Coordinated Projects Payments: outline how payments will be calculated and distributed	
24	Reporting: arrangements for the coordination of periodic reports/Financial Reports discussed	

Kick-Off Meeting Essentials

- Who's who
- Amendments
- Linked agreements (e.g. data and material transfer agreements)
- Personnel costs and recruitment
- Timesheets
- Procurement
- Exchange rate
- Documentation to be retained
- Reporting
- Payment of partners (when we are coordinating)

Common errors / issues which can be avoided by having a kick-off meeting

- Confusion over who to contact – creates unnecessary emails and PI frustration
- Ineligible costs
- Failure to complete timesheets
- Failure to correctly follow the King's procurement process
- Failure to keep required documentation/records



