Tool 4: Checklist: Lead partner qualities

Cross-border collaboration projects involve the organisations of at least two countries. As a result, one partner needs to take on the role of **coordinating lead partner with overall responsibility for the project process**, while the other project partner(s) take on specific responsibilities according to the project plan.

As a case of natural progression, the lead partner is often the party that initiated the project idea. Taking on the lead partner role requires a certain level of resources, knowledge, administrative and financial capacity. There are various ways to handle this: 1.) either the initiating partner feels comfortable taking the lead, 2.) or the lead is taken by a partner organisation that feels comfortable with the related responsibilities 3.) or a subcontractor with experience of project management and administration is hired so that the partner organisations may focus on project content.

The lead partner plays a key role in the partnership building process and leads the process of formulating objectives, the project plan and the structure of activities. In addition, the role of leading a project also requires interpersonal skills to coordinate project partners and ensure and maintain their collaboration.

|  |
| --- |
| Benefits of being the lead partner |
| * Control over content, financial management and delivery of results * Notification at the regional, national and EU level * Avoiding the risk and downsides of working together with a different lead partner, whose performance may not be as good * Building up contacts and networks for potential future cross-border collaboration |

This checklist gives guidance on which qualities a lead partners should fulfil.

Please put a cross in the relevant field (‘yes’, ‘no’).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dimension** | * **Specific qualities to be fulfilled** | **Yes** | **No** | **Comments** | **Consequences** |
| **Capacity/ experience** | * Strongly involved in project idea generation |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Good networker in the given field |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Know-how concerning national and international project funding and EU regulations |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Sufficient human and financial resources to manage the project scope |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Expert knowledge of the project topic |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| **Coordination** | * Keeps strategy, project goal and work plan on track |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Negotiation skills to define roles and responsibilities within the project team |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Flexibility in dealing with unforeseen situations during the process without losing the main focus of the project goal |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| **Communication** | * Motivational skills to build up a working project team |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Good understanding of the subject and ability to check the quality of inputs of project partners |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Information hub for all project partners, external stakeholders and authorities. |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Problem solving skills in case of conflicts among partners |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Availability if project partners need assistance |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Managing cultural and languages gaps and all related issues |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| **Financial management** | * Knowledge base for all project partners for questions regarding reporting, record keeping, auditing and eligibility |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |
| * Scheduling and keeping track of deadlines |  |  |  | *Please consider the consequences if the specific qualities are not fulfilled* |

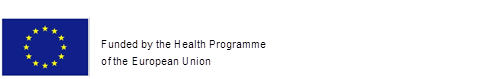
Source: (INTERact, n.d.)

Reference

INTERact. (n.d.). *Project management handbook*

**LEGAL NOTICE**

This document was produced under the Health Programme (2014-2020) in the frame of a specific contract with the Consumers, Health, Agriculture and Food Executive Agency (Chafea) acting under the mandate of the European Commission. The content of this document represents the views of the contractor and is its sole responsibility; it can in no way be taken to reflect the views of the European Commission and/or Chafea or any other body of the European Union. The European Commission and/or Chafea do not guarantee the accuracy of the data included in this document, nor do they accept responsibility for any use made by third parties thereof.

****

Description: \\10.1.0.28\public\Organisation\Standards\Logos_2012\Forschung_Logo.eps

Written by Gesundheit Österreich  
Forschungs und Planungs GmbH

March 2018