3. Implementation

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3. Implementation

- 3.1 **Work plan - Work packages, deliverables** => overall structure of the project, coherent and effective work plan, description of the Work package and tasks, list of deliverables incl. appropriate of the allocation of tasks and resources

- 3.2 **Management structure and procedures** incl. critical risk and mitigation measurers, milestones, appropriate management structure connected innovation management process and exploitation plan.

- 3.3. **Consortium as a whole** => description of the consortium, involvement of industrial/commercial participants, involvement of other countries.

- 3.4 **Resources to be committed** => completed financial tables (PMs per WP), justification of the "other direct costs" items for each participant (=only if the total exceeds 15% of personnel costs for that participant)

Page limit: For full proposals, the cover page, and sections 1, 2 and 3, together should not be longer than 70 pages (for RIA actions!)

Implementation - TIPS (2)

Work plan and resources

✗ Activities and resources responding to the Type of Action, the challenge and methodology

✗ Clear and credible interactions and integration between WPs and partners, including for interdisciplinary work

✗ Linkage between responsibilities – tasks – deliverables – resources

✗ Clear roles with task allocation corresponding to partner profiles and adequate number of actors

✗ Adequate use and number of deliverables and milestones for proper monitoring of progress

✗ Appropriate management resources for the size and complexity of the project

✗ Budget for collaboration with other projects

✗ Innovation Actions (IA) – Timing of the demonstration

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Implementation - TIPS (3)

Risk management

✗ Key risks covered and risk level indicated

✗ Effective mitigation measures and contingency plans

Management structure

✗ Tailored to size, nature and complexity of the project

✗ Clearly identified roles, composition and interaction of management and advisory bodies, including decision making

✗ Appropriate to deal with the innovation process - Innovation management

✗ Credible mechanisms for quality assurance and performance monitoring

Summary: H2020 Terminology

- **Work package**: a major sub-division of the proposed project.

- **Task**: Part of a work package, describing one of the steps or smaller section of the work.

- **Deliverable**: a distinct output of the project, meaningful in terms of the project's overall objectives and constituted by a report, a document, a technical diagram, software component, etc.

- **Milestones**: control points in the project that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin.

WP Description

Table 3.1a: Work package description (For each work package):

Work package number		Start Date or Starting Event					
Work package title							
Participant number							
Short name of participant							
Person/months per participant:							
Objectives							
Description of work (where appropriate participants							
Deliverables (brief description and mon							

Objectives
- clear and **comprehensible**
- **realistic** and **feasible** (personnel, technical equipment, financially, in time) **(SMART)**
- Sub-objectives of main objective (project)

Tasks
- **Detailed description** of what you want to do to achieve the projects objectives: Result: **Deliverables**

Deliverables
- Results of WP
- Coherent labelling: e.g. D 4.2

Source: FIT for health

Deliverables vs. Milestones

- **Deliverable**: a compulsory output of your project
- tangible or intangible object produced as a result of project execution
- A report, study, questionnaire or a product / artifact, can also be a workshop

- **Milestone**: is a way of checking to what extent you are making progress (show a means of verification to confirm a milestone is attained)
- A milestone can be completing a specific phase of a project while the related deliverable includes things like the design of the study, a questionnaire, requirements for the definition of the sample, etc.

Deliverable planning

- Related to a work package / task

- Associated to a "lead partner" (main responsible partner)

- Can be of different types:
  - R: Document, report (excluding the periodic or final report)
  - DEC: Websites, patents filing, market studies, press & media actions, videos, etc.
  - OTHER: Software, technical diagram, etc.

- Can be widely disseminated or just for internal use:
  - **PU** = Public, fully open, e.g. web
  - **CO** = Confidential, restricted access under specific conditions
  - **CI** = Classified information

Milestone planning

- Project start and end
- End of an **important step** in the project, "Decision Point"
- Control points in the project that help to chart progress.
- Milestones may correspond to the completion of a key deliverable (or several deliverables), allowing the next phase of the work to begin
- **Duration = 0 days**
- Related to a Workpackage (e.g. end of a specific phase)
- Not more than 7 – 10 milestones in one project (rather less)
- Formulated as event, incident, happing with a defined date
- Include a means of verification

PERT DIAGRAM

PERT diagram
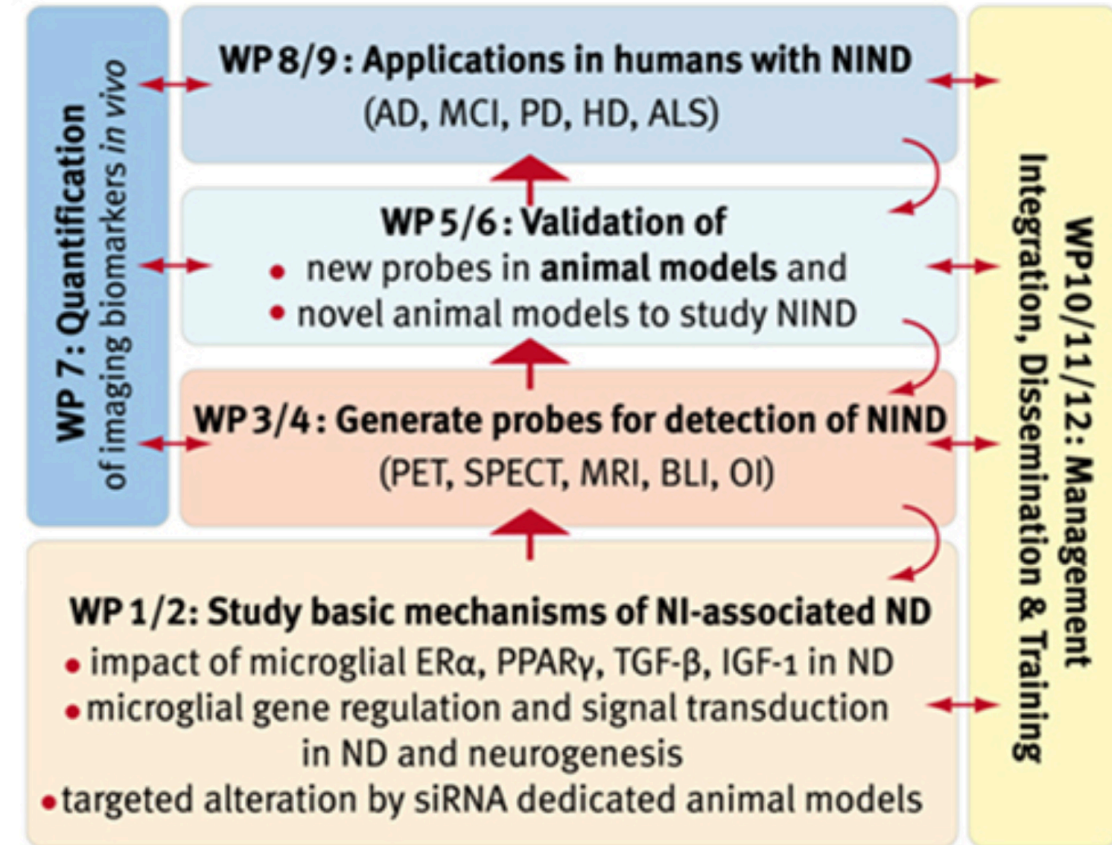
INMiND project (www.uni-muenster.de/InMind/)

www.fitforhealth.eu

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Time Management - Gantt Chart

- „A Gantt chart is a horizontal bar chart developed as a production control tool in 1917 by Henry L. Gantt, an American engineer and social scientist.“

- graphical illustration of a schedule

- helps to plan, coordinate, and track specific tasks in a project

- Horizontal axis: time broken down into days or months

- Vertical axis: tasks

- Doesn‘t clearly show task dependencies

Gantt Chart
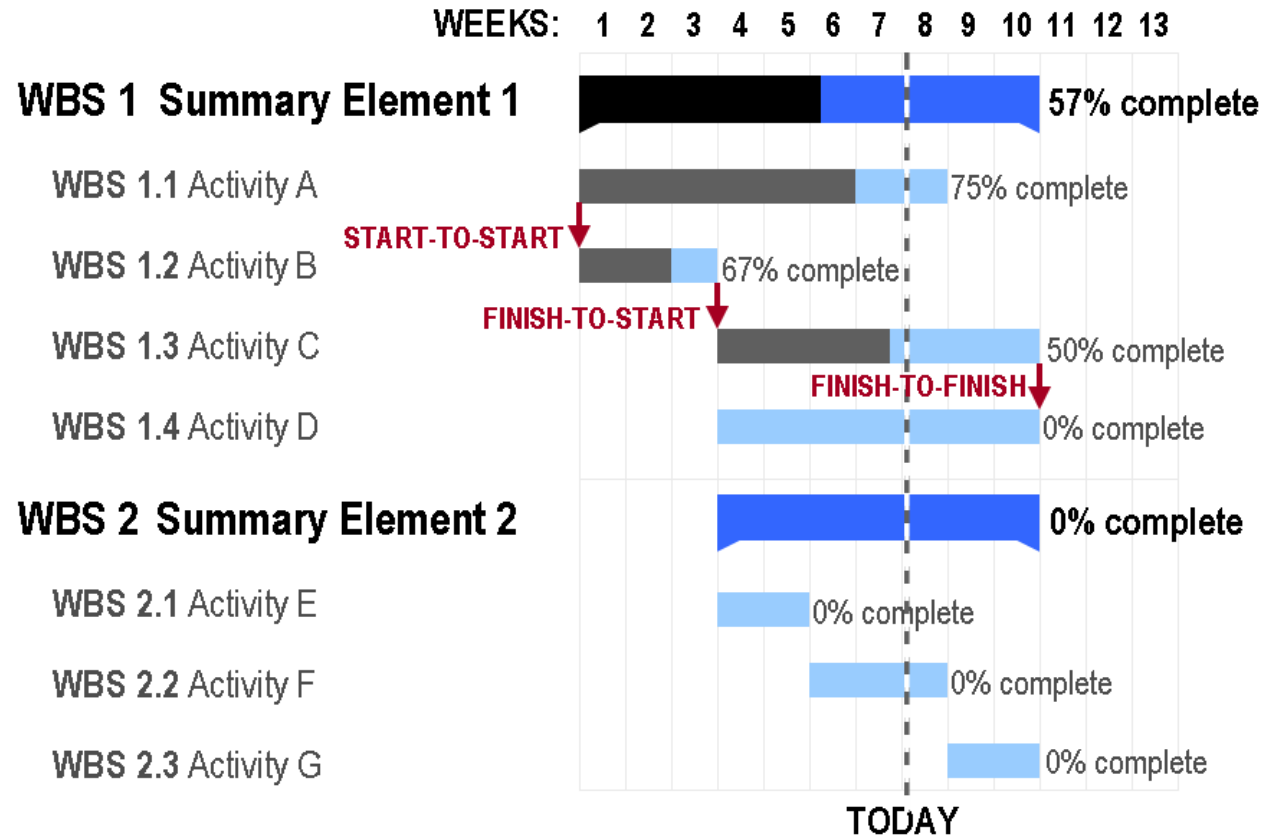
Terminology

- **H2020:**
- EC GLOSSARY
  http://ec.europa.eu/research/participants/portal/desktop/en/support/reference_terms.html
- IPR HELPDESK:
  https://www.iprhelpdesk.eu/glossary/a

- GENERAL PM TERMINOLOGY:
- https://www.smartsheet.com/complete-glossary-project-management-terminology

Project Managament Structure in H2020

EXAMPLE

EUROPEAN COMMISSION
(Project officer, Financial, officer, Legal officer, etc.)

External Panel Review

Project Coordinator – P1

P2

P3

PROJECT MANAGAMENT BOARD

P4

P5

P6

P7

P8

P9

P10

P11

Work package Leader

Task Leader

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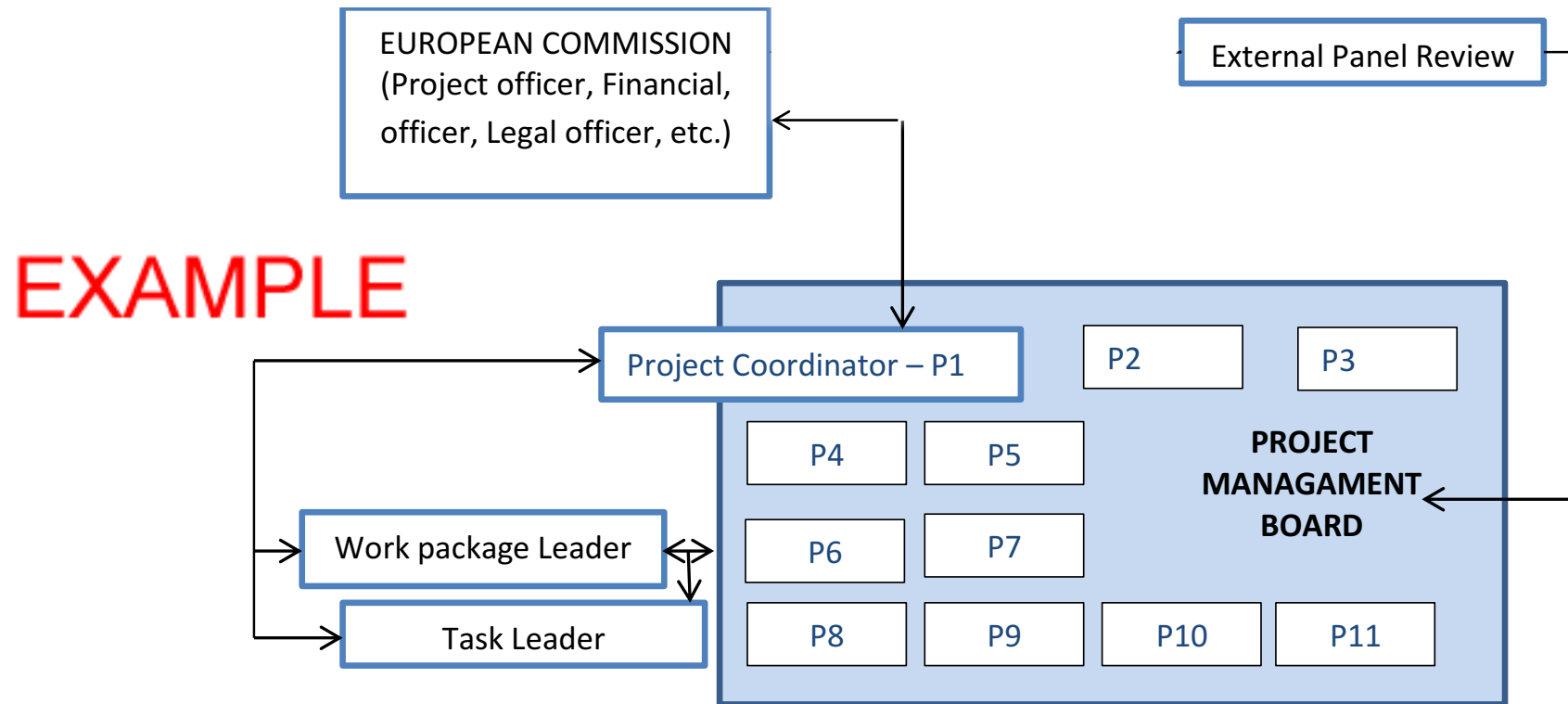
Roles of project participants

- **Each of the project partners can have different roles.**

- **Roles are defined in the project workplan description**

- **All project partners :**
    - Should fulfil their tasks duly, timely and according to the distribution of work specified in Annex I or amended by the decisions of the PMB
    - Timely delivery of all financial statements and reports to the Coordinator

Coordinator

- Responsible for overall project management

- Intermediary between the project and EC

- Ensures communication with the ERP

- Monitors compliance of the partners with their obligations

- Collects, reviews and submitts information on the progress of the project, reports and other deliverables to the EC

- Admnisters the financial contribution of the EC and fulfills financial tasks

- Transmits on time documents and information connected with the project

- Chairs the PMB meetings, proposes decisions and monitors the implementation of the project

Scientific Coordinator
Administrative and Financial Coordinator

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Work package Leaders

- responsible for the overall coordination of the WP, supervision of the tasks, activities, milestones as well as the related deliverables
  - preparing a draft periodic plans for the WP tasks to be approved at the PMB meetings
  - reporting to the coordinator and to PMB
  - organising communication within the respective WP and, together with the Coordinator and other WP Leaders, across WPs
  - presenting the WP conclusions, decisions, results and deliverables at external meetings
  - taking, in agreement with the Task Leaders, decisions at the WP level
  - analysing and documenting any Default of a party in relation to the own WP activities and preparing a respective proposal for an action plan to the Coordinator

Task Leaders

- responsible for the timely implementation of the activities in the task and the reporting to the WP Leader

- are taking, in agreement with the concerned WP Leader, decisions at the task level

Deliverable Leaders

- responsible for the timely and final write-up of the deliverables
- coordinate the work on the deliverable and report to the Task Leader, the WP Leader and the Coordinator
- need to comply to the official deadlines for the submission of the deliverable for the Quality Assurance and to the European Commission

Project Management Board / General Project Assembly

=> Main decision-making body

- Members: all project partners, chaired by the Coordinator

- Main tasks:
  - To review project implementation and progress of work
  - To approve the deliverables before submission to the EC
  - To share knowledge on project implementation and to provide suggestions for its further development based on the project outcomes, input from the ERP
  - To decide upon adaptations of the Annex I and consortium budget
  - In case an activity can not be implemented, making a priority list for the future possible activities and deciding on the option based on criteria of efficiency, feasibility, impact and relevance
  - To tackle problems, delays and resolve conflicts

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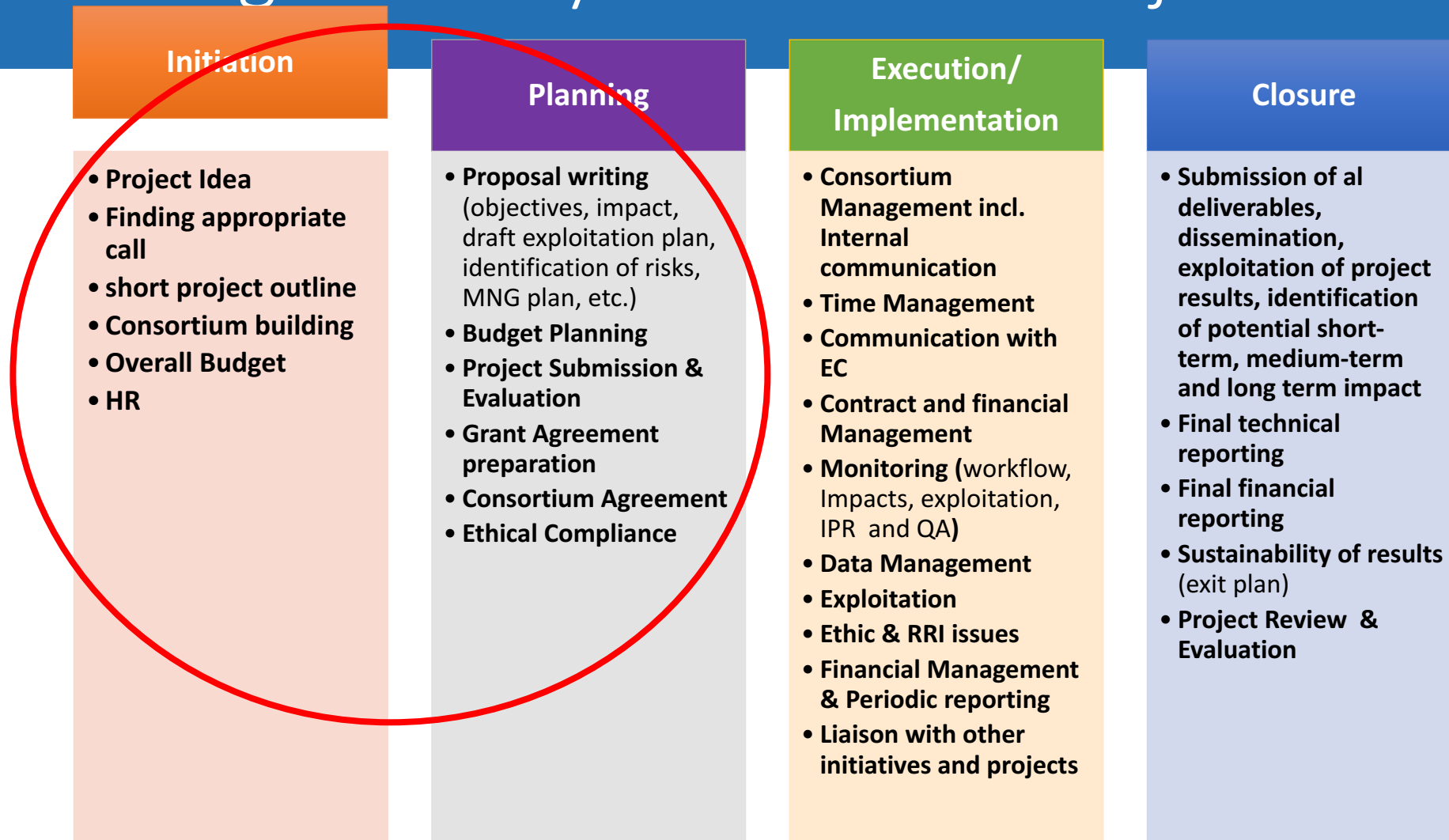# External Review panel (ERP) – optional body

Rational:

- To establish the external review panel (e.g.3 senior external experts) to monitor the quality of project deliverables and internal materials of the project.
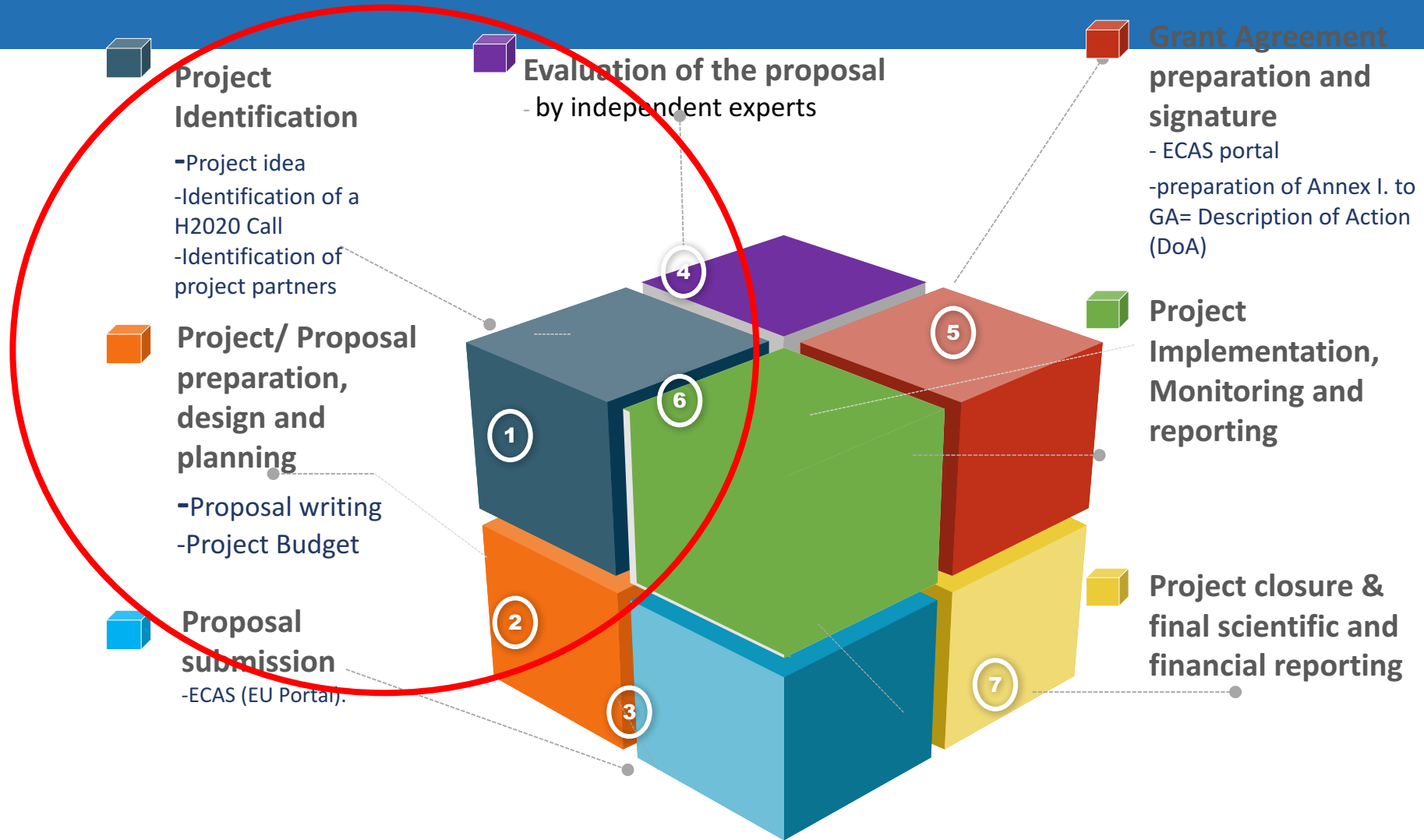
ROLE:

- Quality Assurance of the project deliverables and activities

Project Management Cycle in H2020 Projects

Initiation

- Project Idea
- Finding appropriate call
- short project outline
- Consortium building
- Overall Budget
- HR

Planning

- Proposal writing (objectives, impact, draft exploitation plan, identification of risks, MNG plan, etc.)
- Budget Planning
- Project Submission & Evaluation
- Grant Agreement preparation
- Consortium Agreement
- Ethical Compliance

Execution/Implementation

- Consortium Management incl. Internal communication
- Time Management
- Communication with EC
- Contract and financial Management
- Monitoring (workflow, Impacts, exploitation, IPR and QA)
- Data Management
- Exploitation
- Ethic & RRI issues
- Financial Management & Periodic reporting
- Liaison with other initiatives and projects

Closure

- Submission of al deliverables, dissemination, exploitation of project results, identification of potential short-term, medium-term and long term impact
- Final technical reporting
- Final financial reporting
- Sustainability of results (exit plan)
- Project Review & Evaluation

PM Cycle in H2020 projects - Extended

Project Identification

- Project idea
- Identification of a H2020 Call
- Identification of project partners

Project/ Proposal preparation, design and planning

- Proposal writing
- Project Budget

Proposal submission

- ECAS (EU Portal).

Evaluation of the proposal - by independent experts

Grant Agreement preparation and signature

- ECAS portal
- preparation of Annex I. to GA= Description of Action (DoA)

Project Implementation, Monitoring and reporting

Project closure & final scientific and financial reporting

① ② ③ ④ ⑤ ⑥ ⑦

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YOU FOR YOUR ATTENTION!

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https://ri-links2ua.eu/

Stella S. Shapoval
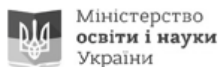**Project co-coordinator**
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