



Europa Media Trainings

Essential tools and “weapons” for a top-notch coordinator

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Reporting procedures & monitoring

⚙ Internal technical report

Internal reporting

- Overview of the work done by all beneficiaries
- Usually done at half-period
 - E.g. if 18-month period => internal reporting at M9
- Highlights issues that may hinder the implementation of project activities
- Make distinction between types of reporting (internal, periodic, continuous)

💡 Internal reporting is **not mandatory by default**. You can **make it mandatory by including it in the CA**.



Reporting procedures & monitoring

⚙️ Internal financial report

- Well-planned budget = easy job during implementation 💡
- Internal financial reporting = underspending/overspending alert and finding solutions in time
- Each partner is individually responsible for their spending & reporting



Overspending, underperforming partner

- Our project has arrived at the end of the first reporting period (M18)
- One of your partners reported 75% of its total allocated project budget in the Financial Statement (Form C) at the end of the first reporting period
- Simultaneously, this partner has reported only approximately 35% of its activities as implemented in the periodic report. (Based on the activities described and person-hours reported)

 **Would you accept this report? Yes, or no? If no, then what would be your next move?**



Risk Management

⚙ Risk register

WHAT?

- Risk management = continuous process to identify, analyze, monitor and control risks
- Risk register = identify and handle causes of project deviations

WHY?

- Recommended to avoid “disaster” situations
- Included in your continuous reporting

B	C	D	E	F
Risk Description		Probability	Impact	Prevention and Mitigation
Technical Risks				
1	<i>Conceptual Design not well aligned with business requirements and domain knowledge</i>	15%	Moderate	<i>The work plan is structured in two iterative cycles with a synchronization every 6 months to ensure alignment with requirements;</i>
2				
3				
4				
5				
6				
Financial/Management Risks				
7	<i>Personnel leaves before project completion</i>	80%	Moderate	<i>Introduction of common responsibility and backup developers (at least two people are familiar</i>
8				
...				

Termination of a bankrupt beneficiary

- Your project platform is due at M10. The first nine months were satisfactory. You, the coordinator, distributed the first part of the advance-payment as it is described in the CA
- Deliverable and milestones of the period were submitted. One month ago, in M9, all partners submitted the first internal report – technical and financial - to the coordinator (You)
- The performance of the partners is great except two partners P5 and P8 (P2 significantly improved!)
- You had a call with these partners, and you agreed that they will put more efforts and cover those delays that are linked to the activities in the upcoming period. As both Partners were convincing, you approved their internal report and transferred the second part of the advance-payment.
- One month later P8 bankrupted (money has been paid but the work is not done).



What is the solution? What would be the next step? What if more than one partner would like to take over the tasks and resources of P8?



IPR issues

⚙️ IPR Matrix

- **Background IP** – know-how/knowledge/data held by beneficiaries and brought to the project
 - ⇒ attached to generated project assets to help determine access rights, ownership issues and IPR
- **Foreground IP** – results/info generated under the project
 - ⇒ to create a concrete mapping of project results and enhance the IP portfolio
- **Exploitable result** – outcome of project that can be commercialized/exploited as a standalone result
 - ⇒ based on the FG, ID the exploitable assets + IPR management procedures (protection, access rights., exploitation plans...)

WHY?

- To help the coordinator to properly **report continuously** these elements



Results table in HE

Table 3.1 Results

Name	Result type	Key results (KER) Does this result have a high potential?	Description of high potential*	Expected time to impact* When do you expect the result to be exploited or used?	Audience or target group*	Webpage of the result*	Horizon Results platform* Do you intend to publish this result on the Horizon Results Platform?	Steps undertaken towards exploitation**	Market maturity** The state of the market targeted by this result	Indicate if you have used any support service from the European Commission**
<i>[Free text]</i>	POL: Policy recommendation, guidance, awareness raising, advocacy	High policy or regulatory potential <i>[Multiple choice]</i>	<i>[Free text] (max. 200 characters)</i>	1 to 2 years	Policy-makers and authorities, national	<i>[URL or N/A]</i>	<i>[Yes/No]</i>	Pilot, demonstration or testing <i>[Multiple choice]</i>	Market creating: not existing but potential for the creation of a new market	Choose an item. <i>[Multiple choice]</i>

Identification of KER, the type of potential, link with other results (publications, datasets, IPR and standards)

**Questions only asked for KER
** Questions only asked for KR + only if 'Result type' is: SCI, PROD,*

SERV, PROC, BUS, DSG, or METH.

Results Ownership List in HE

Table 3.2 Results ownership List

Single or Joint ownership of result Indicate the number of owners	Result owner(s)	Owner country of establishment	Will the owner(s) exploit the result?	If relevant, in which form will the result be made available to other consortium member(s) and/or third party(ies)	Does the exploitation of the results require access to background of one or several consortium members? (*) If yes a compulsory question opens below	Does the exploitation of the results require access to third party IPR? ** If yes a compulsory question opens below
[1,2,....]	<p>[Entity or Individual]</p> <p>Entity: Drop down option with project partners + 'Other'. 'Other' opens a field asking for name, address, country, and an identifier such as VAT number.</p> <p>Individual: Drop down option with 'researchers in project (pre-filled)' + 'Other'. 'Other' opens a field asking for name, address, country, and an identifier like ORCID, Researcher Id.</p>	Pre-field for project partners	Yes/No	Choose an item.	Yes/No	Yes/no/not known

New obligation under HE, it was identified as being an obstacle for the uptake of research results

Conflicting exploitation interests

- As a KPI, you, the university partner in charge, have to publish a peer-reviewed article on a technology you are developing in your project
- You have developed this technology jointly with an industry partner (i.e. a private company)
- You have prepared the first version and shared it with the industry partner, but they asked you to delete any specifications of the technological solution you are developing together
- You did that and submitted the paper for peer-review, which was rejected because it lacked those technical specifications
- The industry partner refuses to give away and make those public as they want to commercialize and patent that technology. If any info is disclosed publicly, that would not be possible anymore



How would you sort out this issue?



Dissemination & Communication in H2020

⚙ Dissemination report table H2020

WHAT?

- Keeping track of dissemination & communication efforts & activities internally

WHY?

- To be able to report the values in your continuous reporting

💡 Use the template to gather these numbers from your partners on a regular basis, to sum up the efforts more easily at the end.

Summary for publication	Deliverables Ethics, DMP, Other Reports	Milestones	Critical Risks	Publications	Dissemination	Patents (IPR)	Innovation	SME Impact	Gender	Energy	ABS Regulation
✓	i	i	✓	✓	✓	✓	✓	✓	✓	✓	i

Total Funding Amount	155,628.00 €
Organisation of a Conference	0
Organisation of a Workshop	0
Press release	0
Non-scientific and non-peer-reviewed publication (popularised publication)	0
Exhibition	0
Flyer	0
Training	0
Social Media	0
Website	0
Communication Campaign (e.g. Radio, TV)	0
Participation to a Conference	0
Participation to a Workshop	0
Participation to an Event other than a Conference or a Workshop	0
Video/Film	0
Brokerage Event	0
Pitch Event	0
Trade Fair	0
Participation in activities organized jointly with other EU project(s)	0
Other	0

Dissemination & Communication in HE

Dissemination report table HE

3.2 Dissemination activities

Table 3.8: Dissemination activities – (mentioned in the proposal and new ones)

Activity name	What? Type of dissemination activity	Who? Target audience reached	Why? Description of the objective(s) with reference to a specific project output	Status of the dissemination activity
	Meetings	Policy-makers and authorities, international	200 characters max	Choose an item.

Instead of a text in part B, the Dissemination and Communication are now in a table. In a semi-structured format for dissemination in order to extract data

3.3 Communication activities

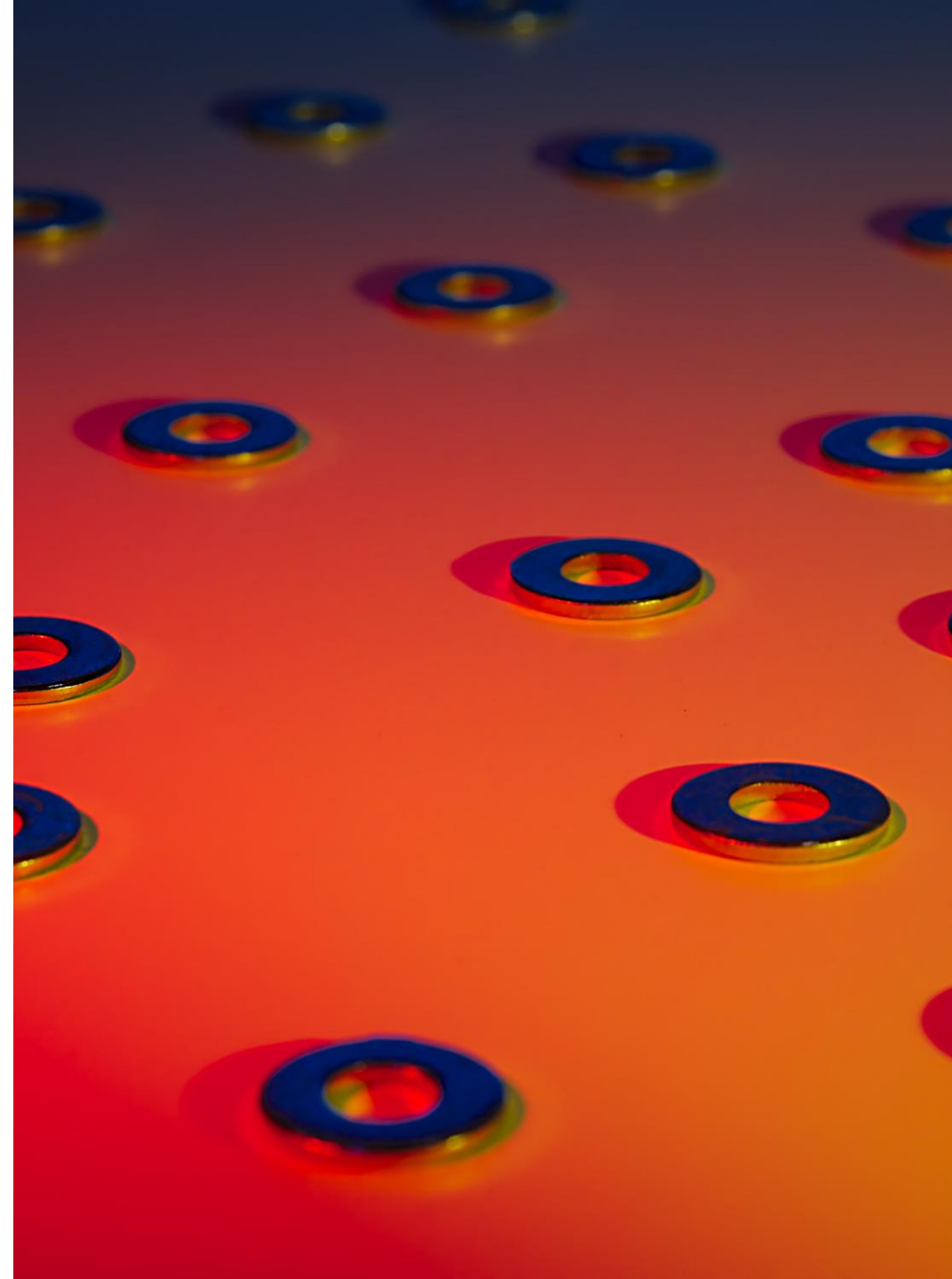
Communication activity (short label, as described in the DEC plan)	Description of implemented activity (free text)	Target audience (Who?)	Communication channel (How?)	Outcome of the activity (IMPACT**)	Status of the communication activity
		Choose an item.	Choose an item.	(free text)	Choose an item.

** We would advise to give clear guidance of what we expect. It would be very specific Key performance indicators similar to what is suggested by DG COMM for our corporate communication <https://myintracomm.ec.europa.eu/corp/comm/Evaluation/SiteAssets/Pages/Do-You-Need-Methodological-Guidance/Communication%20Network%20Indicators%20.pdf>

Communication efforts

- Time for an EC review meeting...
- One of your reviewers is a communication expert and they were NOT 100% satisfied with your project's dissemination & communication activities and Key Performance Indicators (KPIs)
- They request you to review your dissemination & communication activities and increase your KPIs

 **How would you handle this? What would this mean from a project management perspective?**



Communication efforts

What reviewers say...

D5.1	Dissemination, Awareness raising and Communication Plan – First version	Accepted	<p>This is a very good first version of the Dissemination, Awareness raising and Communication Plan particularly concerning the identification of target groups and especially the key messages and dissemination/communication tools for each target group which are described very well.</p> <p>Appropriate social media accounts have been set up with regular, appropriate posts and as stated in this deliverable, all consortium members are encouraged to like and share posts. There is always the risk that interest and therefore likes and especially shares reduce over time and so the reviewer recommends that the consortium keep active and where necessary provide additional comments in other languages on their own social media accounts to increase awareness locally. It is also recommended to track internal versus external followers/reactions to social media accounts.</p> <p>The list of indicative external events for dissemination listed in Table 5 are mainly on a European level. It is recommended that the project also identifies external events in the target area of Central and South Eastern Europe and especially the countries where pilots will be held.</p>
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A black clothespin is attached to a white card, which is hanging from a string. The card has the word "QUESTIONS?" written on it in bold, orange, uppercase letters. The background is a plain, light gray wall.

QUESTIONS?

Thank
you

for your attention

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