

Europa Media online course



The Project Handbook

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Project coordination in Horizon Europe

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Set up a system...

A set of guidelines to have:

- Summary of the legal, admin and financial obligations
- Detailed budget table
- Quality assurance plan
- Internal procedures:
 - Internal admin processes
 - Internal financial processes
 - Internal communication processes
 - Meetings and information sharing etc.



Internal monitoring

Reporting

A set of templates to have:

- Internal reporting (technical & financial)
- Exploitation & IP management
- Data management
- Dissemination and Communication activities and templates

⚙️ **Internal technical report HE**

⚙️ **Internal financial report HE**

⚙️ **Dissemination report table HE**

💡 All these tools can be mentioned and linked in your **Project Handbook**. To be effective, the consortium should know about these from the kick-off meeting.



Project Management Toolbox

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Other content

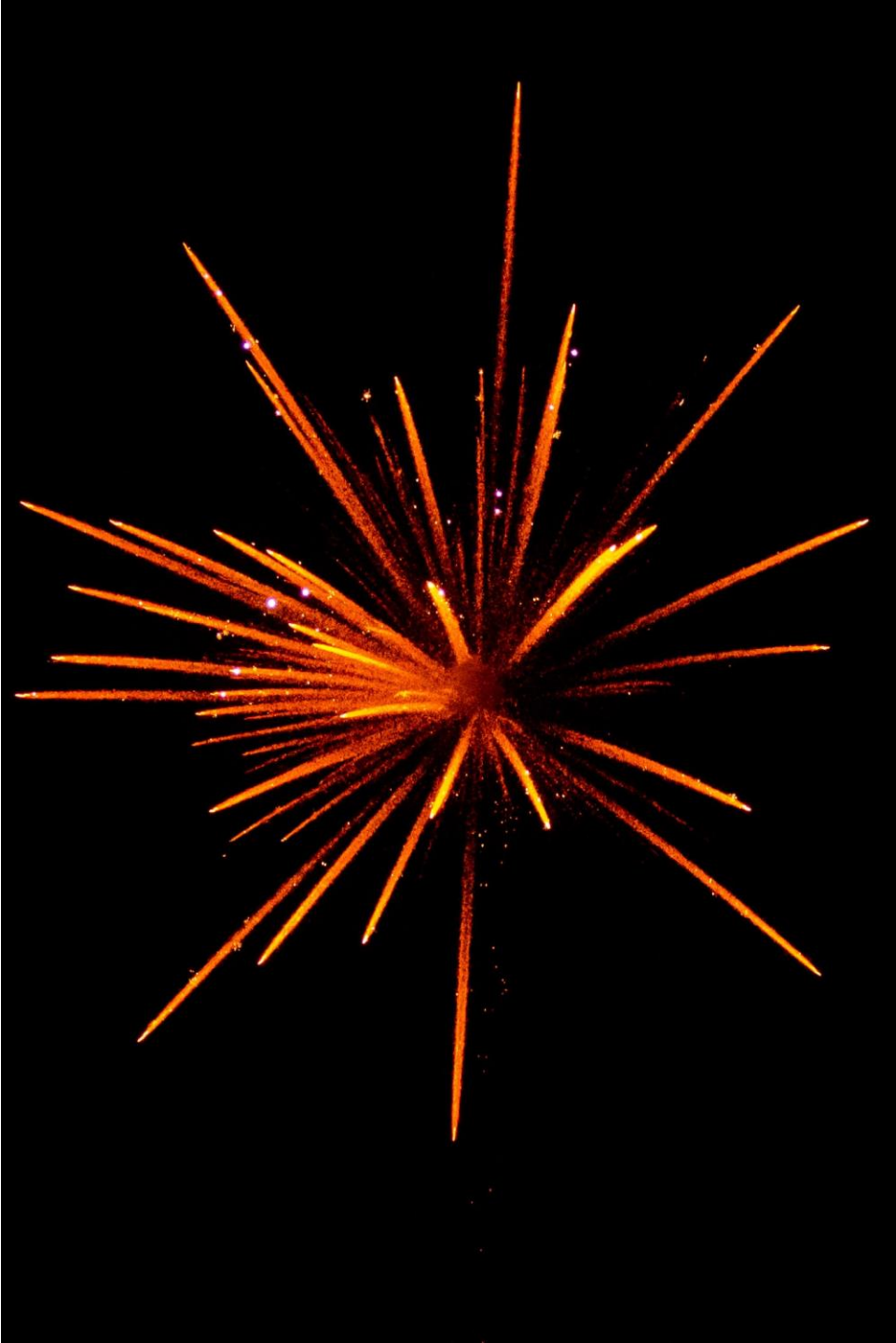
- KPIs
- Action plan for X months
- Special CA and/or GA provisions

Kick off meeting

Agenda

- Project overview: overall objectives, foreseen activities & results, role of partners, expected outcomes...
- Activities per Work Package (WP) – by each WP leader
- Project Officer intervention
- Action plan for first 6 months (discussion & validation)
 - Activities per partner
 - Deadlines
 - Responsible partners
- Setting up the system
- Other: nominate and confirm governing bodies, e.g. the Steering Committee

💡 **Are your partners newcomers?** A short chat about basic rules on good implementation & financial management is recommended.



Life after kick-off

⚙ Semestrial Action Plan

⚙ Meeting Minutes template

- A good kick-off meeting ends with a 6-month Action Plan
- Do not forget the meeting minutes & share presentations/templates/materials...
- Internal “protocols” test (make a change immediately if necessary)
- Team test: a team makes the dream work

Title	Empowering innovation intermediaries to generate sustainable initiatives to incentivise			
Acronym	InnORBIT			
Start date	1-Jan-2021			
End date	30-Jun-2023			
Kick-off Meeting - Action List 20th and 21st January 2021 (remotely - GoToMeeting)				
Action No.	WHAT	WHO	WHEN	STATUS
1.01	Create and share a template for creating a list of stakeholders to be involved in various project activities (e.g., T1.1, T1.2, T1.3 as well as T3.3)	Q-PLAN	26-Jan-21	
1.02	Agree on the ecosystem countries to be mapped in Task 1.1	All partners	31-Jan-21	DONE
1.03	Produce and share with all involved partners the interview questionnaire, level matrix and country dossier templates to be used under Task 1.1	STP	31-Jan-21	
1.04	Provide contacts to be included in the interviews for Task 1.1 to STP	ALG, COR, ROS, SEN	1-Feb-21	
1.05	Draft the questionnaire required for the interviews of Task 1.2 and share with partners for feedback and comments	Q-PLAN	19-Feb-21	

InnORBIT

“Empowering innovation intermediaries to generate sustainable initiatives to incentivise and accelerate the commercialisation of space innovation”

GA Number

KICK-OFF MEETING MINUTES

20 - 21 January 2021
Remote (GoToMeeting teleconference tool)



This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement N° 101004212.

Project Management Platforms

To use or not to use?



- No copy-paste from different sheets, online system
- Comparisons & calculations made automatically
- Automatic deadline warnings
- Notifications on admin tasks programmed & sent automatically



- Expensive & might not save time for partners
- Different versions, overcomplication
- Seen as administrative burden
- Always need to check carefully data, bugs & mistakes if any

Internal communication

The tools & new reality

- File sharing: Google Drive? DropBox? SharePoint?
 - Exchanging quick messages: Slack? Teams?
 - Email lists?
 - Project email list
 - Work Package leaders email list
 - ...
 - Calls: Skype? Teams? Zoom?
 - Virtual project meetings (at least for now): Zoom? GoToMeeting?
- 💡 Count in the current circumstances – choosing the right tools or internal communication.



Quality Assurance Plan

- Governance Structure
- Communication Protocols
- Meetings
 - Project Meetings
 - Project Steering Committee Meetings
 - Work Package And Task Meetings
- Deliverables
 - Internal stages of deliverable creation
 - Internal Reviews/Quality Checks/Deadlines
- Periodic And Final Reports
- Internal Reporting
 - Technical Reports
 - Financial Reports
 - Dissemination And Exploitation Reports



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 (*)



Budget Monitoring

	ES	ES	ES	ES	ES	ES	ES	ES	ES	ES	Total WPs	%
WP1 - Management and Coordination	3	1	1	1	1	1	1	1	1	1	10	8.27%
Task 1.1 Monitoring progress and quality assurance	3											
Task 1.2 Intra consortium communication and coordination	2.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5			
Task 1.3 Financial, administrative and technical coordination	4	1			2							
Task 1.4 Gender Strategy												
WP2 - Education Outside the Classroom (EOC) Hub	1.5	3	2.5	3.5	4.5	5.5	10.5	4.5		37.5	19.38%	
Task 2.1 Literature review and compendium of outdoor practices		1.5	1	2	1	1.5	1	1.5				
Task 2.2 Stakeholder mapping and establishment of local stakeholder networks within each region	1	1	1	1.5	1.5	2	1	1				
Task 2.3 Building an EOC Hub	0.5	0.5	0.5	1	1	1	4	1				
Task 2.4 Defining the methodology for 4 different age groups												
WP3 - Implementing the OTTER Outdoor Lab	1	1	1	9	9	9	10.5	7.5		48	24.81%	
Task 3.1 Development of the OTTER Outdoor Lab		1	1	2	2	2	3	2				
Task 3.2 Adaptation of the OTTER Outdoor Lab to each country's requirements				1.5	1.5	1.5	1.5	1.5				
Task 3.3 Development of Training and Guidelines for Teachers	1						2	2				
Task 3.4 Pilots: implementation of the OTTER Outdoor Lab by the teachers in the chosen schools				3.5	3.5	3.5	4	2				
WP4 - Monitoring and evaluation of knowledge and skills acquired	0	1	11	10	1	1	1	1		26	13.44%	
Task 4.1 Development of overarching monitoring and evaluation framework			3	2								
Task 4.2 Development of methodologies for monitoring and evaluation of the pilots			3	2								
Task 4.3 Development of methodologies for monitoring and evaluation of project outcomes in terms of students' scientific knowledge and 21st century skills			1	2								
Task 4.4 Coordination of all assessments			2	1	1	1	1	1				
Task 4.5 Analysis and synthesis of monitoring and evaluation results, including a perspective on gender and geographical differences		1	2	3								
WP5 - Scattering knowledge and opportunities	2	6	7	5.5	1	3	1	6.5		34	17.97%	
Task 5.1 State of the art of out of school science in Europe: a mapping study				3	2			1				
Task 5.2 Quality assurance framework		3						4				
Task 5.3 Transferring the EOC model for future applications	2			1	1		3	1				
Task 5.4 Practical recommendations for assessment methods		2	2	2.5								
Task 5.5 Guidelines for accreditation			3	2								
WP6 - Dissemination & Communication and Exploitation	11	4.5	2.5	3.5	2	2.5	2.5	2.5		32	16.54%	
Task 6.1 Dissemination, communication plan and visual identity												
Task 6.2 Dissemination material	4											
Task 6.3 Joint dissemination actions and scientific outreach	2	2	1.5	1.5	1	1.5	1.5	1.5				
Task 6.4 Communication and public outreach to all societal levels	1.5	2.5	0.5	0.5	0.5	0.5	0.5	0.5				
Task 6.5 OTTER EOC's programme exploitation plan	0.5	2	0.5	0.5	0.5	0.5	0.5	0.5				
Total	25	21	24.5	35	18	21.5	26	22.5		193.5		

SUMMARY OF STAFF EFFORT												
	Participants				Pilot	Pilot	Pilot	Pilot			Total	%
Work Packages												
WP1 - Management and Coordination	9.3	1.5	0.5	2.5	0.5	0.5	0.5	0.5	0.5	16	8%	
WP2 - Education Outside the Classroom (EOC) Hub	1.5	3	2.5	5.5	4.5	5.5	10.5	4.5	37.5	19%		
WP3 - Implementing the OTTER Outdoor Lab	1	1	1	9	9	9	10.5	7.5	48	25%		
WP4 - Monitoring and evaluation of knowledge and skills acquired	0	1	11	10	1	1	1	1	26	13%		
WP5 - Scattering knowledge and opportunities	2	6	7	5.5	1	3	1	6.5	34	18%		
WP6 - Dissemination & Communication and Exploitation	11	4.5	2.5	2.5	2	2.5	2.5	2.5	32	17%		
Total	25	21	24.5	35	18	21.5	26	22.5	193.5	100%		

TOTAL BUDGET										
	ES	ES	ES	ES	ES	ES	ES	ES	ES	Total
Person-month rate	5,500 €	7,890 €	8,633 €	5,395 €	3,600 €	4,550 €	4,200 €	5,000 €		
Total person months	25	21	24.5	35	18	21.5	26	22.5		193.5
Personnel costs	137,500 €	165,690 €	211,509 €	188,825 €	64,800 €	97,825 €	109,200 €	112,500 €		1,087,849 €
Travel costs	8,260 €	8,580 €		9,380 €	6,650 €	8,970 €	7,370 €	8,470 €		67,150 €
Other	21,000 €	1,000 €	1,000 €	21,000 €	14,000 €	26,000 €	36,500 €	3,500 €		124,000 €
subcontracting										
financial support to third parties										
n-kind contributions not used on the beneficiary's premises***										
total direct costs	166,760 €	175,270 €	221,889 €	219,295 €	85,450 €	132,795 €	153,070 €	124,470 €		1,278,999 €
Overheads* (25%)	41,690 €	43,818 €	55,472 €	54,824 €	21,363 €	33,199 €	38,268 €	31,118 €		
total estimated eligible costs	208,450 €	219,088 €	277,361 €	274,119 €	106,813 €	165,994 €	191,338 €	155,588 €		1,598,748 €
EU contribution (100%)	208,450 €	219,088 €	277,361 €	274,119 €	106,813 €	165,994 €	191,338 €	155,588 €		1,598,748 €
...										11%

	ES	ES	ES	ES	ES	ES	ES	ES	ES	Total
WP1 - Management and Coordination										
Project Meetings	6000		2500	2500		2500	2500			16000
WP2 - Education Outside the Classroom (EOC) Hub										
IT services for the EOC Hub				15000						15000
										0
										0
WP3 - Implementing the OTTER Outdoor Lab										
Pedagogical services	0	0	0	9000	0	13000	10000	7000		39000
Translation				3000		3000		2000		8000

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

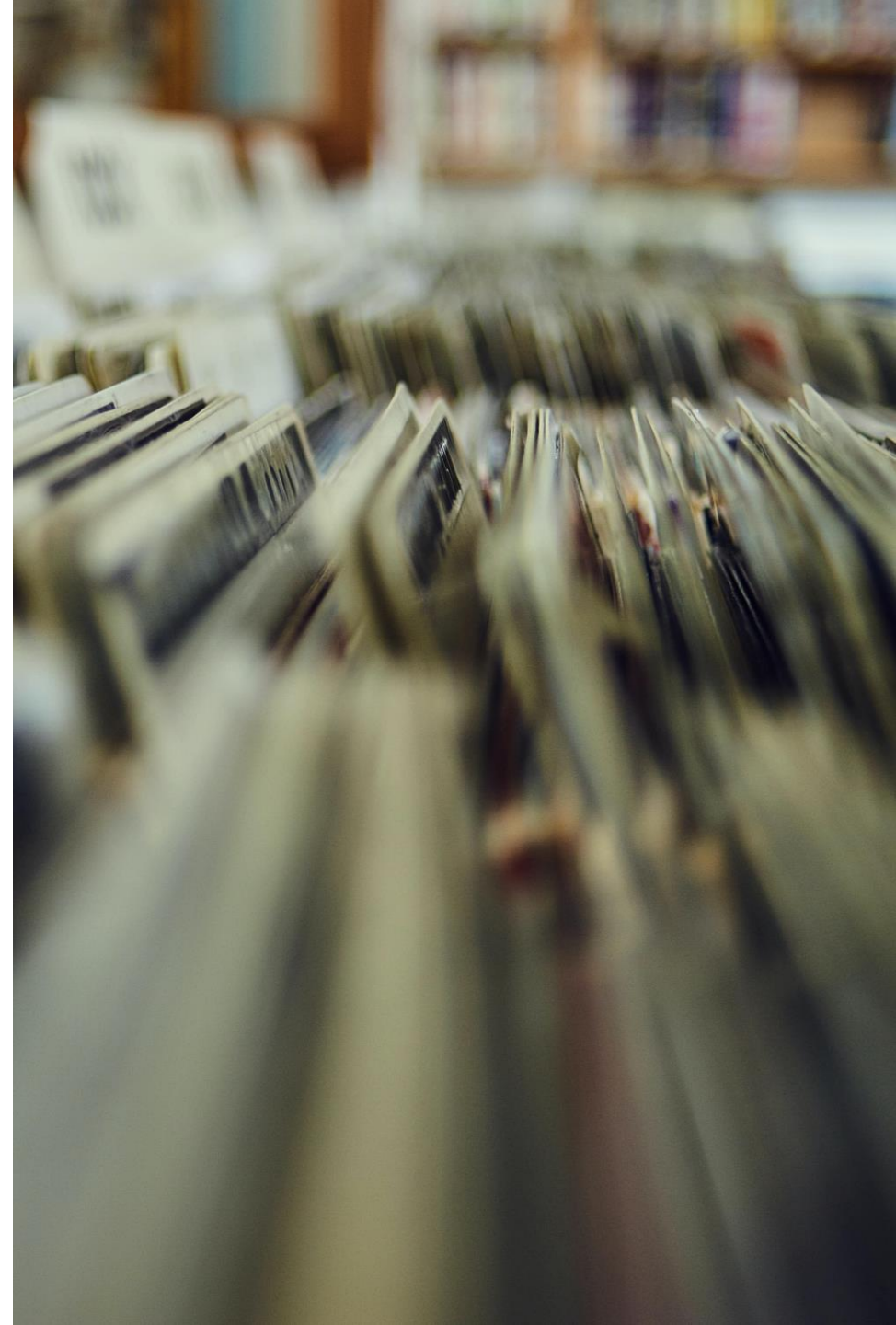
B	C	D	E	F
Risk Description		Probability	Impact	Prevention and Mitigation
Technical Risks				
1	<i>Conceptual Design not well aligned with business requirements and domain knowledge</i>	15%	Moderate	<i>The work plan is structured in two iterative cycles with a synchronization every 6 months to ensure 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				
...				

Tools for Exploitation & IP management

- Under the exploitation management task
- Exploitation leader to oversee process (task leader) and ask for information from partners
- Help discussions on ownership, protection and exploitation of results
- Important for jointly owned results
- Periodic workshops to discuss with all partners

 IP Note

 IPR Matrix



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



Tool for Dissemination & Communication

- Under the dissemination and communication work package
- Dissemination and communication leader to oversee and ask for information periodically

 **Dissemination communication exploitation report table**



Dissemination & Communication in HE

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

Dissemination report table HE

Dissemination Activity Name	What? Type of dissemination activity	Who? Target audience Reached	Why? Description of the objective(s) with reference to a specific project output (max 200 characters)	Status of the dissemination activity
EuSPRI Conference Paper (FhG)	Conferences	Research communities	In this study, our focus is on gendered innovation. In	Ongoing
Panel participation (SDU)	Conferences	EU Institutions	This event was in celebration of the completion of a	Delivered
Presentation Nov 2022 (SDU)	Meetings	Research communities	This was an annual meeting for provice chancellors a	Delivered
Oral presentation Nov 2022 (SDU)	Conferences	Research communities	Event hosted by the Royal Danish Academy with the	Delivered
Presentation Oct 6th (SDU)	Meetings	National authorities	Presentation of INSPIRE to the task force for gender,	Delivered

Communication report table HE

Communication Activity Name	Description	Who? Target audience	How? Communication channel	Outcome	Status
information about INSPIRE website launch (UJ)	information about INSPIRE launch on UJ	Research communities	Social media	awareness about the project	Delivered
UJ social media campaign	For the website launch	Civil society	Social media	raising awareness about the proje	Delivered
UJ social media campaign - teaser	Information about the project kick off	Civil society	Social media	raising awareness about INSPIRE	Delivered
Social media activity - retweet GE SUMMIT (UJ)	on Tweeter of @ACTonGEinCEE Ewa re-t	Citizens	Social media	social media	Delivered
GESIS - Online publication CEWSjournal: Campaign	Online publication CEWSjournal: Campa	Citizens	Social media	publication and social media awa	Delivered
Social media activity - UH	Tweet that describes what UH has been	Research communities	Social media	social media - project awareness	Delivered
Retweet on faculty's TW on INSPIRE's blogpost - UH	Retweet on faculty's TW account	Research communities	Social media	social media	Delivered
GESIS - website info in DE and EN	Updates on detailed project description	Citizens	Website	project visibility	Delivered
Promoted INSPIRE in a news article of UHasselt	Monthly magazine that put a spotlight o	Research communities	Interview	Media/press visibility	Delivered
GESIS - Retweet	Introducing the INSPIRE partners	Citizens	Social media	visibility	Delivered
Social media activity - TW (UJ)	on Tweeter of @ACTonGEinCEE Ewa post	Citizens	Social media	visibility	Delivered
information on PM2 in Ljubljana - UJ	Ewelina Ciaputa posted a summary of P.	Citizens	TV/Radio campaign	blog post	Delivered
GESIS - Retweet of INSPIRE post for SPEAR project	Retweeting INSPIRE's post on the SPEAR	Citizens	Social media	social media	Delivered

A white rectangular card is suspended from a thin, black and white braided string by a black clothespin. The card is centered horizontally and has the word "QUESTIONS?" printed in a bold, orange, sans-serif font. The background is a plain, light gray wall.

QUESTIONS?

THANK YOU!

for your attention

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