Europa Media Trainings

The Project Handbook
The Toolset and Procedures to Coordinate Properly

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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.

A set of templates to have:

- Internal reporting (technical & financial)

- Exploitation & IP management

- Data management

- Dissemination and Communication activities and templates

💡 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.

The Project Handbook

- What will be uploaded to the file sharing tool of choice - some documents will be dynamic!

- Existing documents / Mock-ups and examples of what will be developed

- Most important: exhaustive list

Table of Contents

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

Tools 1# 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**

Tools 1# 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 proj	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

Tools 2# 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**
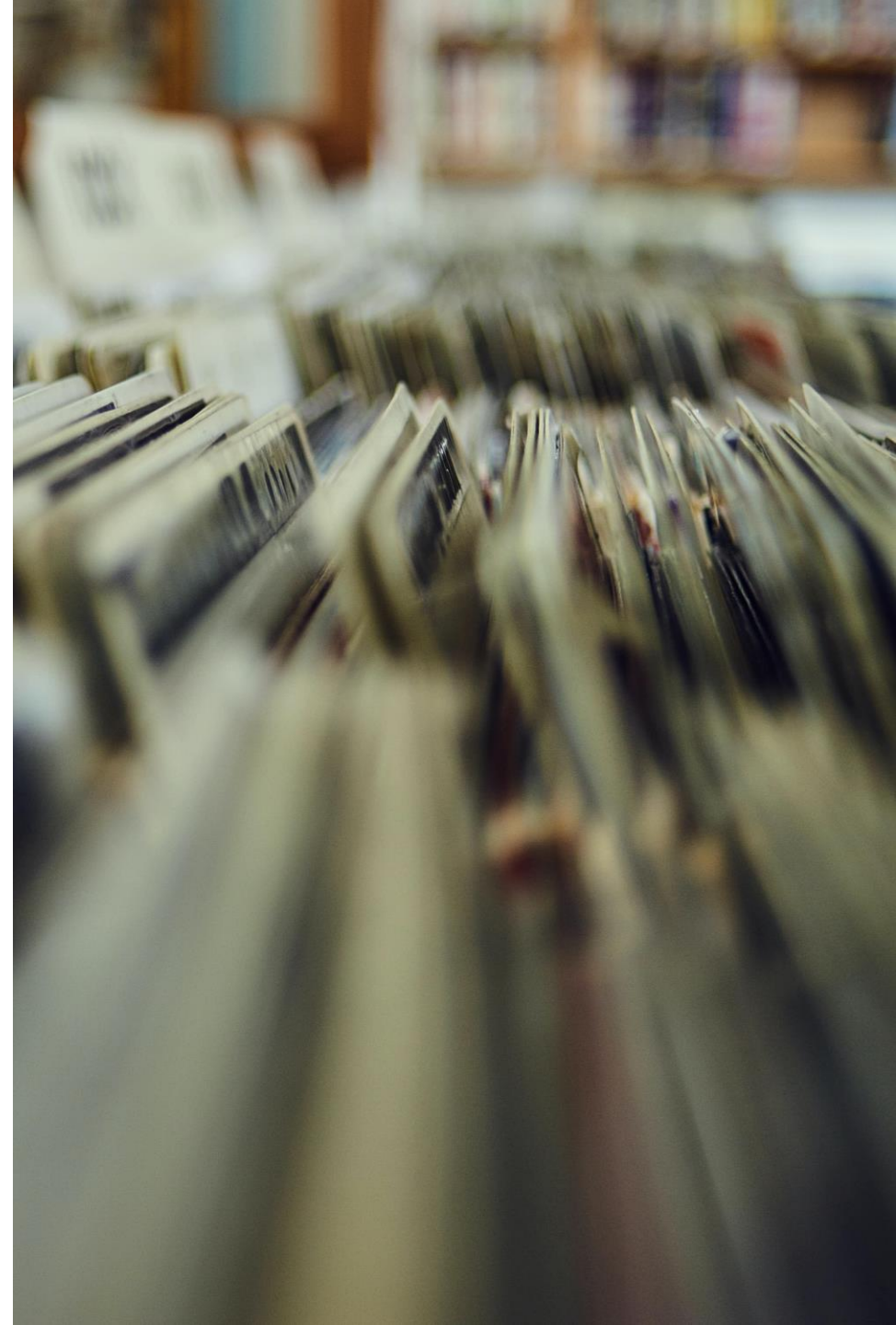
Tools 3# Risk Management

⚙ **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	*Conceptual Design not well aligned with business requirements and domain knowledge*	*15%*	*Moderate*	*The work plan is structured in two iterative cycles with a synchronization every 6 months to ensure alignment with requirements;*
	2				
	3				
	4				
	5				
	6				
		Financial/Management Risks			
	7	*Personnel leaves before project completion*	*80%*	*Moderate*	*Introduction of common responsibility and backup developers (at least two people are familiar*
	8				
	...				

Tools 4# Data Management

- Under the data management task

- Data management leader to oversee and ask for information periodically

- Use your Data Management Plan for details

⚙ **Data Management Plan** **(template by the EC)**

Tools 5# Internal reporting
Technical part

- 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**.

⚙️ **Internal Technical Reporting Template**

Tools 6# Internal reporting
Financial part

- Budget monitoring

- Underspending/overspending alert and finding solutions in time

- Each partner is individually responsible for their spending & reporting

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

⚙️ **Internal Financial Reporting Template**

QUESTIONS?

Thank you

for your attention

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