PROJECT TOOLBOX – SETTING UP A SYSTEM

We call it a toolbox, you may call it differently. Here, we mean a folder of project management tools, which you, as a coordinator, prepare for your partners to support their everyday administration of work progress, financial and technical reporting, archiving, etc.

Such a system allows the coordinator and all the partners to follow up the project progress, eases the burden of administration, and enables the coordinator to accurately react to the inquiries by the Commission about the project at any time.

A project toolbox normally includes:

- Official documentation: GA, CA, DoA

- Official guidelines: Reporting, financial and other guidelines prepared by the EC

- Task list and schedule for 6-12 months – Gantt chart, a list of results to be achieved, documents to be submitted, including responsible partner(s)/person(s), deadlines, review stages – In one document! – Regularly updated (min. quarterly)

- Internal Reporting Template (Technical) – a Word template and maybe an online tool to upload documents, data, records, images, etc.

Internal Report Template (for all partners)

Task Monitoring Table

- Internal Financial Reporting tool (online platform or Excel sheet)

Cost Monitoring Table (to monitor the budget spending)

Cost Justification Template (to have justification for all major cost items)

Person-months status (to monitor the staff effort allocated)

- Dissemination Reporting Form (Excel or Word or Online programmed)

Dissemination and Exploitation Report Form

- Excel pre-programmed is a good solution

Quality Assurance Plan

- Quality check process description – The Quality Assurance Plan or the CA will define this process (see more later)

Minutes of the meeting

- Minutes of all meetings (at the end of the minutes there is the list of common decisions, task schedule that partners should be able to check anytime)

Contact list

- Contact list – emails/phones

Other:

- Communication Plan (normally the CA or the Quality Assurance Plan includes it)
- Archiving, administration procedures (normally the CA or the Quality Assurance Plan includes it)

Make sure that all the templates and guides you prepare contain detailed instructions, explanations and REAL examples which the partners can build on.
In case you have inexperienced partners in your consortium, you may extend the content of the toolbox:

- Guide to the Participant Portal with screenshots.
- Training material or links to online training on EU project management

Some of these templates are downloadable from our website.