

**COORDINATOR'S STARTER KIT TO**

# **PROJECT COORDINATION**

**The EU Project Handbook – Focus: Horizon Europe**

## **FOREWORD**

At Europa Media, we've been proudly managing and coordinating EU projects since 1999.

Our team of experts is passionate about sharing our knowledge and experience with you. Over the years, we've created a wide range of publications, launched online platforms, and organised numerous conferences and training courses. We've had the privilege of learning from thousands of participants in our training programmes and events, and their insights have been invaluable.

With our latest publication, our goal is to provide you, as a project manager and coordinator, with practical tools and tips that will truly support your work. We've carefully curated a collection of the handiest templates and project management tools that you can directly implement in your own projects. Instead of rehashing all the rules and legal commitments found in the official EC guidelines, we want to share our own templates that have proven effective in our many projects.

If you find this package useful, please let us know. Your feedback matters to us. We're also eager to hear your own experiences and stories of managing and coordinating EU projects. Your insights will help us create even better resources in the future.

Let's collaborate and make EU project management an even more rewarding experience together.

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# THE TASKS OF A COORDINATOR

Let's allocate a few minutes for the basics:

What are the tasks of a coordinator?

Take a moment to consider the Management and Coordination Work Package (WP) in your project proposal or within the Description of Action (DoA). Have you explored all the tasks listed there? Are you aware of your specific responsibilities and duties?

To give you a better idea, here's a compilation of tasks that typically appear in Management/Coordination WPs. The complexity of the project may determine which tasks are included:

- Scientific coordination
- Administrative coordination
  - ☒ Setting up an overall management structure (acting persons, responsibilities, and teams).
  - ☒ Preparing all project meetings.
    - Planning kick-off activities of the project and kick-off meeting (re-align vision, mission and focus on project outputs and related deliverables).
  - ☒ Generating a project management plan. The plan will describe the indicators, the reporting procedures, the schedule, and the management of the project progress together with appropriate monitoring measures.
  - ☒ Developing a quality assurance plan and monitoring deliverables/processes accordingly.
  - ☒ Developing Risk Management and Contingency Planning.
- Legal and IPR coordination
  - ☒ IPR Management (managing and protecting IPR linked to the results developed in the project).
  - ☒ Drafting and signing a Consortium Agreement (CA), signed before the Grant Agreement (GA)
- Financial coordination
  - ☒ Managing financial aspects, including payments, financial reporting, reallocations, and other financial activities in the project.
- Sustainability and Exploitation (if not part of another WP)
  - ☒ Analysis and actions to make the project and its infrastructure sustainable (overview of the project's sustainability scenarios).
  - ☒ Attracting stakeholders and public and private funding for the expansion of the project).
- Innovation (including exploitation and IPR management)
- Communication
  - ☒ Internal communication within the consortium.
  - ☒ Communication with the EC.

- Gender issues, ethical issues, social impact (horizontal issues).
- Cooperation with other EC projects.

All these tasks are described in a short paragraph in the proposal/DoA. Make sure that all necessary tasks are noted in your project (and in your mind).

## MAIN ROLES AND RESPONSIBILITIES OF A COORDINATOR

- Act as a SINGLE legal representative of the Consortium towards the EC and handle all communication between the EC and the consortium.
- Keep the project on track – keeping the deadlines of the deliverables and submitting them and the official reports to the EC.
- Initiate changes in work content (in line with the GA).
- Handle the advance payments and interim instalments, initiate changes or reallocation in the budget (between categories and partners and in line with the GA and CA).
- Organise and chair the review meetings if needed (decided by the EC).
- Deal with the unexpected.

The above-mentioned tasks shall not be subcontracted – only in very exceptional cases, e.g., spin-off offices taking care of coordination activities for public bodies.

### OTHER TASKS:

- Keeping the address list of members and other contact persons updated and available.
- Collecting, reviewing, and submitting information on the progress of the project and reports and other deliverables (including financial statements and related certifications) to the EC.
- Initiating, preparing the meetings, suggesting decisions and preparing the agenda of the meetings, chairing the meetings, preparing the minutes of the meetings and monitoring the implementation of decisions taken at the meetings.

The above require a good communication, quality assurance and monitoring system and procedures to be set up.

- Leading the negotiations and communication with the EC.
- Drafting a CA and handling all discussions around it.
- Dissemination, marketing of project results, lobbying, cooperation with external parties – as the main representative of the consortium towards the Commission, the public and the scientific community.
- Transmitting documents and information connected with the project, including all relevant communication from the EC towards the consortium.

- Administering the EU financial contribution and fulfilling the financial tasks.
- Providing, upon request, the partners with official or original copies of documents which are in the sole possession of the Coordinator, when such copies or originals are necessary for the partners to present claims.

Is that all? Not nearly! Take a look at the everyday management items below.

## EVERYDAY MANAGEMENT

- Establish effective communication (tools, channels, frequency to be decided and then regular communication maintained) e.g., Mailing lists for the project and work package teams; Skype/Online or phone conference calls for smaller discussions regularly; Face-to-face meetings to be organised cost-efficiently; Common platform for working on documents, etc.
- Manage work content changes (during the negotiation or the implementation).
- Monitor project performance - monitoring compliance by the partners with their obligations (e.g., Partner failure/work performance: inexperienced partners may act as the "weakest link").
- Handle disagreements.
- Interpret the work content to partners if necessary.
- Control spending - budget running low or not spent (e.g., unforeseen expenditures or complaints from partners).
- Deal with extreme situations, and the unexpected e.g., Force Majeure (natural disaster, war, etc.).
- Be sensitive to cultural and gender differences.

Putting all the tasks into perspective, will help you remember them. Link the tasks with project phases; try to differentiate between pure administrative issues and the major tasks that a scientific and official coordinator of the project must perform. Here is a table showing the project lifecycle and its individual phases to help you get started. All you need to do is to tailor it to your project.

## PROJECT HANDBOOK – SETTING UP A SYSTEM

We refer to it as a Handbook, but feel free to use your own terminology. When we mention "handbook," we mean a comprehensive guide designed to assist your project partners in achieving successful implementation. It can take the form of a collection of project management tools or serve as a standalone deliverable. As the coordinator, it is your responsibility to develop this handbook, which will provide essential support for the day-to-day administration of your project, including aspects such as work progress tracking, financial and technical reporting, archiving, and more.

The purpose of this handbook or package of tools is to enable both the coordinator and all project partners to effectively monitor project progress, alleviate administrative burdens, and facilitate timely responses to any inquiries from the Commission regarding the project.

Together with the document you are reading now, you'll find other documents and files that you can use to develop and customise your own 'handbook'.

In this package you'll find:

- A sample **content list** of what elements should be included in the handbook.
- **Internal Technical Reporting Template** – a Word template and maybe an online tool to upload documents, data, records, images, etc.
- **Internal Financial Reporting template** – an Excel template to follow the spending, cost justification, etc.
- **Internal Dissemination, Exploitation and Communication Reporting template** – an Excel template to report all results, all dissemination, exploitation and communication actions (just like the EC would want to see this at the Periodic Reporting)

And you'll also need to include:

- A task list and schedule for 6-12 months. This can be shaped in the format of a Gantt chart together with a list of the results to be achieved, a list of documents to be submitted. Make sure you include the responsible partner(s)/person(s), deadlines, review stages. All this information should be placed in one single document that ought to be regularly updated, hopefully quarterly.

Make sure that all the templates and guides you prepare contain detailed instructions, explanations, and REAL examples which the partners can build on.

*We hope you found this document useful so far.  
We're looking forward to hearing back from you!*

*Good luck in your current and future EU projects,  
The Europa media team*