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Project Management In FP6 Projects


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1. Project Management Basics
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1. Project Management Basics


- ✓ Principles & Approach
- ✓ Management Structure
- ✓ Project Management Team - Roles
- ✓ Management & Quality Plan


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P.M. Principles & Approach

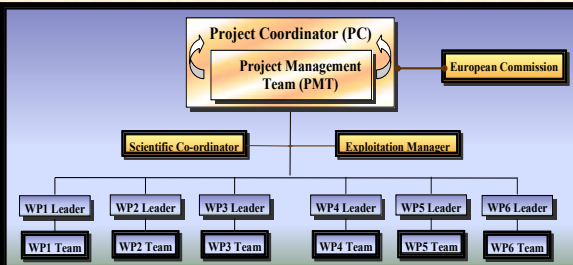
- ✓ To HELP & CONTROL and not to rule
- ✓ Common goal – common interest
- ✓ Clear responsibilities
- ✓ Tailored to each specific project
- ✓ Encourage active involvement – participation
- ✓ Reward results but also recognise and appreciate effort
- ✓ Request respect of the general rules for the project management
- ✓ Good partners are strategic allies
- ✓ Post project exploitation is an important aspect


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Management Structure

✓ An Example ...




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Project Management Team (1/2)

- ✓ Central decision making body
- ✓ Consists e.g. of 1 representative per partner
- ✓ It represents the ultimate authority for all types of decision
- ✓ It deals with both strategic and technical issues
- ✓ Chaired by the Project Coordinator. Responsible for:
 - Administrative / Financial Management
 - Technical / Scientific Management / Coordination

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Project Management Team (2/2)

In case there is a need for distribution in Management:

- ✓ *Project Coordinator (Administrative / Financial)*
- ✓ *Scientific Coordinator (Technical / Scientific)*
- ✓ *Exploitation Manager (Responsible for external relations & prepare post-project Exploitation)*

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Management & Quality Plan

- > **Objective**
 - ✓ *Ensure smooth implementation, quality of deliverables and on time completion of the project's tasks*
- > **Content**
 - ✓ *Management structure and roles*
 - ✓ *Procedures for document and deliverables management*
 - ✓ *Communication*
 - ✓ *Work planning and monitoring progress*


Preparation by the Coordinator
Approval by the Project Management Team


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2. Scientific / Technical Management

- ✓ Scientific / Technical Objectives
- ✓ Success Indicators
- ✓ Work planning
- ✓ Milestones

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Scientific / Technical Objectives

- ✓ **They have to be specific &**
- ✓ **Measurable**

An Example: PANDA project

- *Develop a dynamic partnership-based business model as a distributed RBVO service*
- *Develop an innovative generation of sector-specific Service Level Agreements*
- *Develop a community of Intelligent Agents (Multi-Agent Systems)*
- *Develop an integrated environment (prototype web-platform)*
- *Perform 2 international case studies for prototype validation*
- *Assess PANDA's prototype and prepare the ground for exploitation towards ERP/CRM industry*

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Success Indicators

- ✓ **They have to be measurable.**

An Example: PANDA project


Success Indicator (Demonstration)	Target Value
Objective 3: Testing and validation of PANDA prototype	
⇒ Real world scenarios – international case studies for testing	2
⇒ Set of Key Performance Indicators (KPIs)	1
⇒ Set of scenario's specifications (one per case study)	2
⇒ Case specific communities of Agents and "Ready to Use" Agent's instances and classes	2
⇒ PANDA Demo web-site / testing	1
⇒ Set of measurements and extraction of KPIs and system's functionality parameters (one per case study)	2
⇒ Set of identified modifications on PANDA's prototype	1
⇒ PANDA prototype (after testing's modifications)	1
⇒ Set of PANDA showcases	1

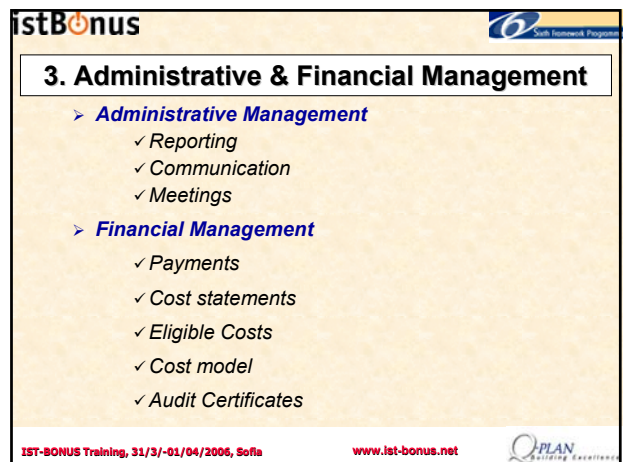
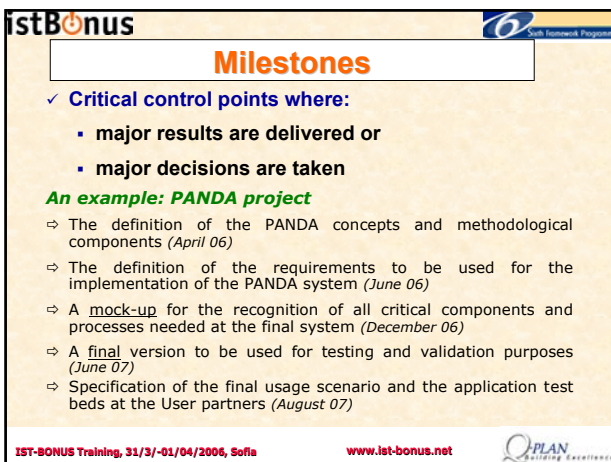
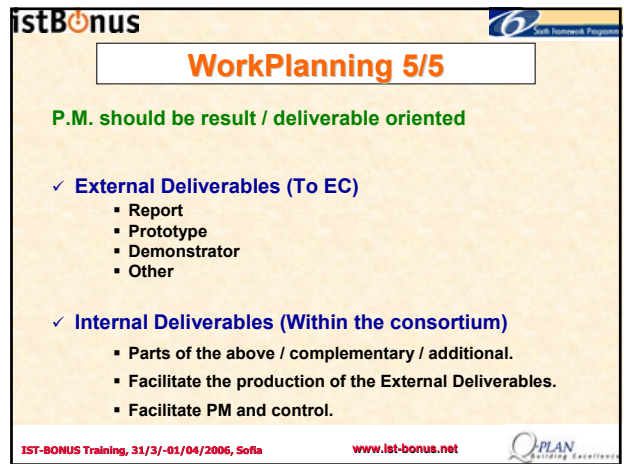
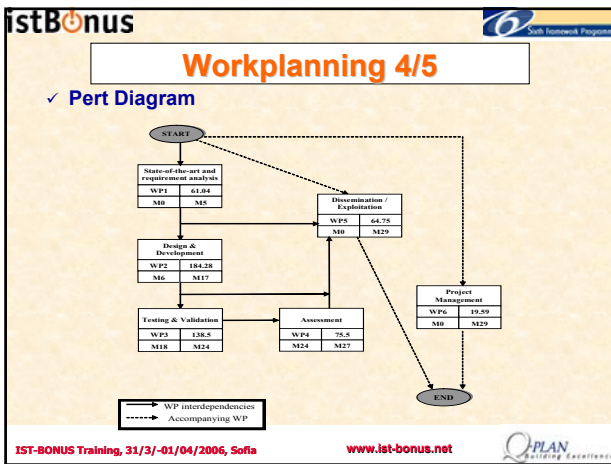
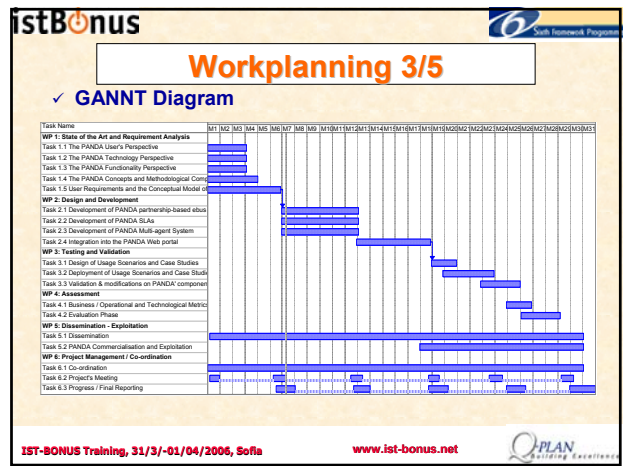
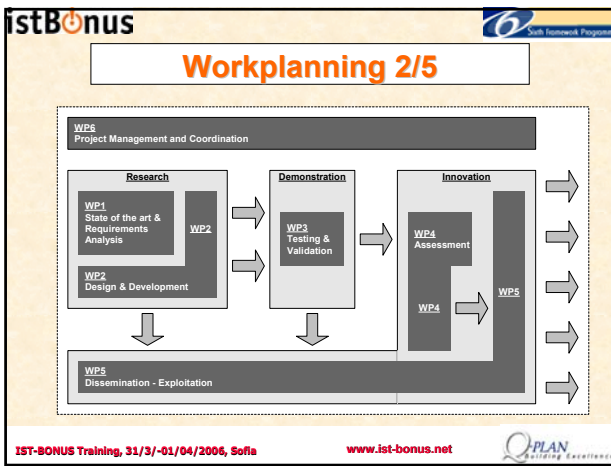
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WorkPlanning 1/5

- > **Project activities / work are organized in:**
 - *Workpackages*
 - *Tasks*
 - *Sub-tasks*
- > **Detailed actions**
 - *Action lists per sub-task / task / WP*
- > **Timetable / Interrelations**
 - *GANNT Diagram*
 - *Pert Diagram*
- > **Results**
 - *External Deliverables (per task / WP to EC)*
 - *Internal Deliverables (within consortium)*


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Administrative Management


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Internal Reporting & Communication

- ✓ Project Meetings' minutes
- ✓ Semester progress reports (6-month)
- ✓ Quarterly informal reporting of activities (3-month)
- ✓ Risk report (only Risk Managers)
- ✓ Monthly communication (tel. / skype / e-mail / tools)
- ✓ Action points list (updated when necessary)


- ✓ Internal cost statements
- ✓ Preparation for EC reporting


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External Communication

- ✓ **With the EC**
 - The Coordinator is the intermediary for communication between the Contractors and the EC services responsible for the project.
 - Contractors may contact directly EC officials within the context of the project's elaboration (e.g. to collect publications and information for RTD projects, reports, etc.) with prior notice to the Coordinator.
- ✓ **Other external communication (e.g. with similar projects, research organizations, industry, etc).**
 - Contractors may communicate with 3rd parties (other than the EC) for the purposes of project elaboration in line with the project's objectives
 - In all external communications a reference to the project should be made (e.g. acronym, EU program, action, contract No)
 - Exploitation Manager usually responsible


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External Reporting (to EC) (1/2)

1. **Intermediate reports (per reporting period)**
 - a. Periodic activity report
 - b. Periodic management report
 - c. Report on the distribution of the EC funding between contractors
 - d. AUDIT CERTIFICATE (when necessary)
 - e. Other

Submission within 45 days following the end of the respective period (with the exception of 2.d)


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External Reporting (to EC) (2/2)

2. **Final report (at the end of the project)**
 - a. Periodic / Final activity report
 - b. Periodic / Final management report
 - c. Audit certificates for all contractors
 - d. Report on the final distribution of the EC funding between contractors
 - e. Other


Submission within 45 days following the end of the respective period (with the exception of 2.d)

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ACTIVITY REPORT CONTENTS


- ✓ *Overview of the activities carried out.*
- ✓ *Description of progress towards objectives*
- ✓ *Progress towards the milestones and deliverables*
- ✓ *Problems encountered and corrective action taken*
- ✓ *Plan for using and disseminating the knowledge*

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Management Report Contents


- ✓ *Justification of resources deployed, linking them to activities implemented and justifying their necessity*
- ✓ *Form C Financial statement*
- ✓ *Financial report consolidating the claimed costs of all contractors (based on Form C)*
- ✓ *Report on the distribution of the EC financial contribution between contractors*

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OTHER REPORTS


- ✓ *The interim science and society reporting questionnaire*
- ✓ *The interim reporting questionnaire on workforce statistics*
- ✓ *The interim socio-economic reporting questionnaire*

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Meetings (1/2)


- 1. Kick-off meeting**
 - a. *At the beginning (to kick-off the project and not the partners)*
 - b. *Extremely Important (All partners should obtain a clear and detailed picture about the project)*
 - c. *Action list for the first period*
 - d. *To build a team spirit (socialise before, during and after)*

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Meetings (2/2)

- 2. Internal meetings (project, technical, etc)**
 - a. *To assess project progress*
 - b. *To take major decisions for the next period*
- 3. Review meetings (EC & External Reviewers)**
 - a. *To assess project progress towards its objectives*
 - b. *To approve deliverables*
 - c. *To propose alternatives*

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Financial Management

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Payments


```

graph TD
    EC[EC] --> PC[Project Coordinator]
    PC --> C[Contractors]
  
```

- Signed contract
- Signed Form A
- Bank account details
- Reports – documents


- Signed Form A
- Signed Consortium Agreement
- Bank account details
- Reports - documents


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Cost Statements


- ✓ Are provided by each Contractor
- ✓ Standard forms are used.
- ✓ There are 2 types of cost statements
 - The one in EC standard form (Form C)
 - The cost statement required by the Coordinator (monitoring expenses files)


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Eligible Costs


- ✓ Are described in Annex I of the Contract.
- ✓ Usual types of Eligible Costs:
 - ❖ Direct Costs
 - Personnel
 - Travel
 - Durable Equipment
 - Consumables
 - Sub-contracting
 - Other
 - ❖ Indirect Costs
 - Overhead
- ✓ The PC should be notified for significant changes on the cost categories and costs
 To inform the EC respectively and take the necessary measures to avoid problems in payments


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Types of Activities (STREP projects)

- ✓ Management Activities (100% funded)
- ✓ Research Activities (50% funded)
- ✓ Innovation Related Activities (50% funded)
- ✓ Dissemination Activities (50% funded)
- ✓ Demonstration Activities (35% funded)
- ✓ Training Activities (100% funded)


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Cost Model

- ✓ Contractors are free to choose Cost Model
 (see: FP6 Financial Guide, or Model Contract Annex II.22 – www.cordis.lu)
- ✓ Three cost models are available
 - FC – Full Cost with actual indirect costs
 - FCF – Full Cost actual indirect flat-rate costs
 - AC – Additional Costs with indirect flat-rate costs

Be 100% sure for your Cost Model
To avoid severe problems in the future

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AUDIT CERTIFICATE

- ✓ Issue by an authorised / certified auditor
- ✓ Based on a indicative template
- ✓ Cover the respective period of the project

Further information – instructions – guidelines are on the FP6 Financial Guide and are available in Cordis (www.cordis.lu)

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4. Managing Changes

- ✓ Technical Changes
 - Workplanning
 - Tasks
 - Deliverables
 -
- ✓ Administrative / budgetary changes
 - Partner changes (withdraw, default, ...)
 - Changes in the Budget among Partners
 - External changes (EC, Reviewers)
 -

Not to forget:

1. Risk Management in Research Projects is a MUST
2. Inform the EC
3. Get approval by the EC

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Thank you!

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