Project management:
tips and tools for monitoring your project
Overview

- Project-internal monitoring processes
- Project management tools
- Recommendations for coordinators & project managers
Internal monitoring processes

*Internal monitoring* of
- activities done
- person months used
- budget spent

**Process**
- gathering data through internal reporting
- continuous check of
  - status quo
  - analysis of deviations
  - adapted planning
  - counter-steering if necessary

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Internal monitoring process - example

*When / how often?*

to be defined in the Consortium Agreement!

*Example „Fit for Health 2.0“*

- Duration: 48 months
- 3 Official reporting periods to the EC: each 18 months and final report, resp.
- 8 Internal reporting periods: each 6 months

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Internal monitoring process - example

Example „Fit for Health 2.0“

Templates to monitor activities:
- Work Package Leader reports
- Deliverable reports

1. Progress towards objectives and details for each task
   Task [no] – [Task title]
   Please describe the process towards the objectives for each task of your respective WP. Feel free to include – if applicable – links, screenshots, pictures, etc. You can use the various deliverable reports and biannual WP reports as a basis – you don’t need to reinvent the wheel!

2. Significant results
   Please provide a list of results/deliverables achieved in your respective WP throughout this reporting period.
   e.g.:
   - Fit for Health Step-by-step guides produced and distributed during project and national events
   - one newcomer training with 130 participants held in Budapest, Hungary
   - etc.

3. Deviations on tasks and corrective actions
   If applicable, please explain the reasons for deviations from Annex I and their impact on other tasks as well as on available resources and planning.

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Internal monitoring process - **deliverables**

Adapted deliverable list  
(from your initial proposal)

Inclusion of progress/deviations  
e.g.
  • done  
  • in progress  
  • delayed (+ justification of delay)
Internal monitoring process - milestones

Adapted milestones list (from your initial proposal)

Inclusion of progress/deviations

e.g.

- achieved yes/no
- forecast delivery date
- justification of delay

<table>
<thead>
<tr>
<th>Milestone no.</th>
<th>Milestone Name</th>
<th>Due delivery date from Annex 1</th>
<th>Achieved Yes/No</th>
<th>Actual/Forecast Delivery Date</th>
<th>Comments/Justification for Delay</th>
</tr>
</thead>
</table>
Overview

- Project-internal monitoring processes
- **Project management tools**
- Recommendations for coordinators & project managers
Project management tools

- Why are they useful?
- Which types of management tools do you need?
- How to choose the ad-hoc tool?
Project management tools

Why are project management tools useful?

- Facilitate to monitor progress
- Simplify reporting (on tasks and on expenditures)
- Provide visibility for all participants
- Locate all information in one place
- Maintain control (resource management)
- Time is money: save time and save money
Project management tools

For coordinators / project managers:

- Structure, status, documents, meetings
- Overview of resources dedicated to tasks
- Support in preparation of “periodic reports”
- Overview on budget and costs:
  - use of person months
  - management of adjustments
  - management of payments
  - support in preparation of financial statements
  - “freeze” of data in closed periods
Project management tools

For project partners:

- **Structure:**
  - overview on WPs and tasks
  - who is in charge for which tasks?
  - how many resources are allocated per task?
  - timetable

- **Documents:**
  - availability of actual versions

- **Meetings & Reporting:**
  - documents, agendas, minutes, presentations
  - templates, guides

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Project management tools

For project partners:

- Quick visual overview:
  - what is the current progress?
  - charts and graphs
  - budget and cost overview

- Status:
  - deliverables
  - milestones
Project management tools

Types of project management tools:

- Simple desktop based tools
- Non Framework project specific e.g. Basecamp, Microsoft project etc.
- Specific Commercial products e.g Project.net, Xtranet-ISA, Bal.PM, EMDESK, etc..
- Scalable towards Horizon 2020
### Project management tools - Example

**Budget allocation and use of resources**

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#### UITP - Strategic Business plan: project budgets

<table>
<thead>
<tr>
<th>Full project</th>
<th>PM</th>
<th>Deadline</th>
<th>ST</th>
<th>PL</th>
<th>AC</th>
<th>PL</th>
<th>AC</th>
<th>Reports</th>
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<td>&quot;</td>
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<td>0.08</td>
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<td>0.00</td>
<td>12</td>
</tr>
</tbody>
</table>

**Total of Person Months used: 14.46 - Allowed: 13.70**

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**PM**: Person Months  
**ST**: Status  
**PL**: Planned  
**AC**: Actual  
> The total of PM actual appear in red if it exceeds the PM assigned  
> For each task, the PM used appear in red if more than planned  
> The deadline and status appear in red when the task is overdue  

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Project management tools – example to test

SUCCEEDIT

It is a free-of-charge but access-restricted platform:

- to support SMEs and researchers in networking, and/or proposal preparation, and project negotiation,
- to allow SMEs and researchers to create on-line Work Sections, to interact and possibly to develop a joint proposal,
- to interact (Discussion Forum) with experts of Fit for Health network and NCPs in the Health theme.

Click here to request your free access to SUCCEEDIT
Watch a short video presentation of SUCCEEDIT

http://www.fitforhealth.eu/page/succeedit
Project management tools

*Choose a tool on basis of:*

- Cost–efficiency
- Security and compatibility
- User friendly – Horizon 2020 usability
- Tested and recommended by FP project coordinators
- Availability after termination of your project (reporting period and data provided on DVD support)
- Tech support and help desk to all users
- Price-estimation: 8 to 20 € per user/month

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Overview

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- Recommendations for coordinators & project managers
Make it easy for **yourself**

- Make a good **planning** of all reporting and payment activities

- Ensure good **support** from your own organisation

- Stick to the **rules** you set up for the consortium
  - Being strict pays off in the end
  - Clear rules are easy to maintain and avoid endless discussion

- **Delegate** reporting tasks down the project hierarchy

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Make it easy for **your partners**

- Provide **clear rules**

- Provide a **project handbook / intranet** environment including:
  - Consortium Agreement
  - Description of Action
  - Reporting templates
  - Contact details

- **Minimize the paperwork:**
  - 4 quarterly / 2 six months reports build 1 annual report
  - focus on the essential information required by the EC

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Make it easy for the **European Commission**

- **Involve** them in your work

- **Avoid** **surprises**!
  - If you need to stray from your plan, inform beforehand
  - In case of problems consult them only when you can propose a solution

- Deliver your reports complete and **on time**

- Share your **success**!

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Overview

- Project-internal monitoring processes
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- Take Home Messages
Our advice for coordinators / project managers

- Learn the Reporting Requirements by heart
  - arrange internal reports to match the official ones

- Contact the EC project / financial officer at an early stage
  - agree on the level of detail they require
  - build a good working relationship

- Plan your reporting activities way ahead
  - you know exactly when all reports are due
  - reserve time in the 60 days you have for reporting
  - instruct the partners in time / use meetings for the reporting briefing

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Thank you!

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