

# Project management: tips and tools for monitoring your project

[www.fitforhealth.eu](http://www.fitforhealth.eu)

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## 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

## 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

# Internal monitoring process - example

## Example „Fit for Health 2.0“

### Templates to monitor activities:

- Work Package Leader reports
- Deliverable reports

WP [no], [WP name]

WP Leader Report Period [1/2/3]



[Name of WP leader]

[Organisation]

#### 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.

## Internal monitoring process - deliverables

Adapted  
deliverable list  
(from your  
initial proposal)

Inclusion of  
progress/  
deviations

e.g.

- done
- in progress
- delayed (+ justification of delay)

Del.no.	Deliverable Name	WP no.	Lead participant	Nature	Dissemination level	Due delivery date from Annex 1	Actual/Forecast Delivery Date	Status / Justification

## 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

Milestone no.	Milestone Name	Due delivery date from Annex 1	Achieved Yes/No	Actual/Forecast Delivery Date	Comments/Justification for Delay

## 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

# 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



MENU
Work sections
Discussion forum
My agenda
Search
Register a new user
My info
Users' guide
Public website
Home
COORDINATOR
Manage projects
Manage members
Manage calendars

### UITP - Strategic Business plan : project budgets

#### Full project

(01/10/2010 > 30/09/2013)					Reporting period 1		Reporting period 2		Reports
		PM	Deadline	ST	PL	AC	PL	AC	
• D4.1 - Online management tool for profiles & ...		1.50	31/03/2011	-	1.50	1.63		0.63	<a href="#">1</a> <a href="#">2</a>
• D6.1 - Website, online 'helpdesk' , FAQ-secti...		2.60	31/03/2011	-	2.10	4.52	0.50	0.77	<a href="#">1</a> <a href="#">2</a>
• D1.2 - 7 Virtual trainings		0.10	31/03/2012	-	0.05	0.07	0.05	0.00	<a href="#">1</a> <a href="#">2</a>
• D3.2 - 2 Strategy trainings for high-tech SME...		0.10	31/03/2012	-	0.05	0.12	0.05	0.00	<a href="#">1</a> <a href="#">2</a>
• D4.2 - Report on 1200 SME profiles & on conta...		2.50	31/03/2012	-	1.25	1.02	1.25	0.16	<a href="#">1</a> <a href="#">2</a>
• D4.3 - Report on 2 Virtual Brokerage Events a...		4.00	31/03/2012	-	2.00	2.18	2.00	1.46	<a href="#">1</a> <a href="#">2</a>
• D6.2 - Report on PR & on cooperation and netw...		1.10	31/03/2012	-	0.55	0.82	0.55	0.06	<a href="#">1</a> <a href="#">2</a>
• D6.3 - Preparation of 10 Success Stories of F...		1.00	31/03/2012	-	0.50	0.40	0.50	0.00	<a href="#">1</a> <a href="#">2</a>
• D7.2 - 2 Annual reports to EC including 2 Imp...		0.50	31/03/2012	-	0.25	0.35	0.25	0.06	<a href="#">1</a> <a href="#">2</a>
• D3.1 - Report on guidelines, 1 internal onlin...		0.20	30/09/2012	-	0.15	0.06	0.05	0.03	<a href="#">1</a> <a href="#">2</a>
• D3.3 - Report on 1 SME Strategy Conference an...		0.10	30/09/2013	-	0.05	0.06	0.05	0.00	<a href="#">1</a> <a href="#">2</a>
Total of Person Months used: 14.40 - Allowed:		13.70			8.45	11.23	5.25	3.17	



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

# Project management tools – example to test

## SUCCEEDIT

## 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





# 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

## Overview

- Project-internal monitoring processes
- Project management tools
- **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

# 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

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