

Project management: tips and tools for monitoring your project

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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					Reporting period 1		Reporting period 2		Reports
(01/10/2010 > 30/09/2013)	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	1 2	
• D6.1 - Website, online 'helpdesk', FAQ-secti...	2.60	31/03/2011	-	2.10	4.52	0.50	0.77	1 2	
• D1.2 - 7 Virtual trainings	0.10	31/03/2012	-	0.05	0.07	0.05	0.00	1 2	
• D3.2 - 2 Strategy trainings for high-tech SME...	0.10	31/03/2012	-	0.05	0.12	0.05	0.00	1 2	
• D4.2 - Report on 1200 SME profiles & on conta...	2.50	31/03/2012	-	1.25	1.02	1.25	0.16	1 2	
• D4.3 - Report on 2 Virtual Brokerage Events a...	4.00	31/03/2012	-	2.00	2.18	2.00	1.46	1 2	
• D6.2 - Report on PR & on cooperation and netw...	1.10	31/03/2012	-	0.55	0.82	0.55	0.06	1 2	
• D6.3 - Preparation of 10 Success Stories of F...	1.00	31/03/2012	-	0.50	0.40	0.50	0.00	1 2	
• D7.2 - 2 Annual reports to EC including 2 Imp...	0.50	31/03/2012	-	0.25	0.35	0.25	0.06	1 2	
• D3.1 - Report on guidelines, 1 internal onlin...	0.20	30/09/2012	-	0.15	0.06	0.05	0.03	1 2	
• D3.3 - Report on 1 SME Strategy Conference an...	0.10	30/09/2013	-	0.05	0.06	0.05	0.00	1 2	
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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- **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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