Checklist

PROJECT MANAGEMENT AND REPORTING

Tick if done

These points below help you in following all steps to smoothly implement your project.

For coordinators:

- ❑ Set up an internal communication system with your consortium (frequency of meetings, emailing, instant messaging, file sharing).
- ❑ Organize the kick-off meeting, then organize progress project meetings preparation (as set out in your proposal) - date, agenda, presentations.
- ❑ Make sure you have a regular (6/9-monthly) action plan to follow up progress.
- ❑ Set up a budget monitoring system.
- ❑ Set up a quality assurance procedure.
- ❑ Provide partners with an internal reporting template with instructions.
- ❑ Provide partners with the periodic report template with instructions, delegate tasks to WP leaders and Task leaders.
- ❑ Check the reports from partners.
- ❑ Discuss the review meeting date with the Project Officer and invite all partners and instruct partners about the review meeting.

For other partners:

- ❑ Prepare for progress project meetings (as set out in your proposal) - date, agenda, presentations.
- ❑ Contribute to action plan to follow up progress - monitor this progress.
- ❑ If you lead a work package, make sure your task leaders and contributors are on time with their work (can be followed with the set action plan)
- ❑ Provide input and data for internal reporting.
- ❑ Provide input for the Data Management Plan, for dissemination and communication, risks when asked.
- ❑ Provide input for the periodic report, both technical and financial.
- ❑ Prepare for the review meeting with presentations on your task(s)/work package(s).

I. Internal processes

1. **Internal communication**
   This process refers to how all partners are going to communicate during the project lifetime and how often. You can set up a project general email address, or a channel on platforms like Microsoft Teams or Slack.

2. **Project meetings**
   For good project implementation and internal monitoring, meet regularly with your consortium partners, to follow up with tasks and set up periodic action plans. You can choose the frequency of project progress meetings at proposal stage and then set up different meeting types and frequencies at the kick-off meeting.

3. **Quality assurance**
   Make sure you have a quality assurance protocol in place to produce qualitative outputs, for instance deliverables. Since these are complex outputs that will need a check or two before submitting the final versions to the European Commission. You can have a quality assurance process as a Project Handbook, to deal with quality of your outputs and data collection processes for reporting.

   Europa Media Learning Materials: Horizon Europe Coordinator's Kit (download it from our Learning Materials page here)

4. **Communication with the EC**
   Your project will be assigned to a Project Officer, who will represent the European Commission and will follow your project's progress. The Coordinator is the sole representative of the consortium that will be in contact and will communicate with the Project Officer.

II. Dissemination and Communication

1. **PEDR**
   When you prepared your proposal, you had a draft Plan for Exploitation and Dissemination of Results including Communication (PEDR). When you implement your project, you need to develop it in detail and submit it as a deliverable by month 6 (M6) of your project. This will be your strategy to follow in terms of dissemination, communication, and exploitation activities.

2. **Collecting data from the partners**
   Since you need to report to the European Commission on dissemination and communication activities, and the exploitation plans for your project results, it's recommended to establish a process through which you collect such data from all partners. The partner(s) leading these activities should oversee this process, using templates like the one suggested below to collect the data.

   Europa Media Templates: Dissemination Exploitation Report Table, IPR Table (download them from our Templates page here)

III. Data management

You already explain in your proposal the main lines on how you plan to manage the data reused or created in your project. However, when you implement the project, you need an entire strategy on data management from collection to archiving. This will be your data management plan, which also needs to be submitted as a deliverable by month 6 of your project. This first deliverable will be the initial strategy which can be updated later in the project.

Since you need to report to the European Commission on the data you reuse or produce during the project, it's recommended to establish a process through which you collect such data from all partners. The partner(s) leading these activities should oversee this process, using templates like the one suggested below to collect the data.

Europa Media Templates: Data Management Table (download them from our Templates page here)

EC Templates: Data Management Plan HE (download it from the Funding & Tenders Portal here)

IV. Risk assessment

It's important to follow up with foreseen and unforeseen risks that might happen during project implementation, as you'll need to report to the European Commission whether any of those risks happened or not. The Coordinator can periodically collect such information from partners through the template below.

Europa Media Templates: Risk Register (download them from our Templates page here)

V. Internal reporting

Internal reporting is a useful tool to keep track of the activities done, the objectives achieved, and funding spent over shorter periods, before reporting to the European Commission. This type of reporting only happens within the consortium.

Internal reporting is led by the Coordinator and there's both a technical/narrative and a financial part, as in your periodic report. It is recommended to establish internal reporting halfway through your reporting period, designated in your Grant Agreement.

The Coordinator should circulate templates like the ones below to all partner, with instructions on where partners should fill in and how.

Europa Media Templates: Internal Report Template, Financial Monitoring Template (download them from our Templates page here)

VI.Continuous reporting

Continuous reporting is a type of official reporting towards the European Commission. It's stated in your Grant Agreement Article 21.1, that you must continuously report on the progress of deliverables, milestones, outputs/outcomes, critical risks, indicators, etc.

In your account on the Funding and Tenders Portal you will be able to access the continuous reporting interface, where you can report on all the elements mentioned above and more.

To effectively do this reporting and collect all necessary data, we recommend you establish internal processes, like the ones mentioned above.

VII.Periodic reporting

Periodic reporting is the other type of reporting you need to do towards the European Commission. It is stated in your Grant Agreement Article 21.2, that in order to request payments beneficiaries must provide reports. Periodic reporting is submitted at the end of a reporting period – your project reporting periods are set in the Grant Agreement.

The period report has two parts: a technical part and a financial part.

EC Templates: Horizon Europe Periodic Report Template

1. **Technical report**
   The technical report represents the narrative of your project progress until the end of a certain period. You will tell the story of your project progress, including how far you are in achieving your objectives and impact, the progress per tasks and work packages, and any technical and/or financial deviations that happened.

   The Coordinator will lead this process with the contribution of all other partners.

2. **Financial report**
   The financial report tells the story of how much each beneficiary has spent until the end of that certain period. The financial report must match the explanations provided by the technical report, whether there was an unhindered progress of your project activities, or whether there were any deviations.

3. **Submission of the report**

You need to submit your full periodic report within 60 days following the end of each reporting period. The continuous reporting data will be automatically added to your report. The periodic report needs to be uploaded to the periodic reporting module, on the Funding and Tenders Portal, as a PDF file. You also have a financial part in the module, where you declare the costs incurred during that period.

4. **EC assessment**
The EC has 90 days to assess your report. The Coordinator usually receives a payment letter and a report detailing the assessment. If the reports need to be updated the Coordinator receives a suspension of the payment deadline letter, and the interim payment is suspended until the report is updated.

5. **Interim Payment**
An interim payment is the payment the European Commission makes to the Coordinator (who will then transfer the reported shares to each partner), after the acceptance of the periodic report.

6. **CFS**
The Certificate on the Financial Statements (CFS) is a report produced by an independent auditor (or, for public bodies, public officer) using the template available on the Funding and Tenders Portal here. Its purpose is to give assurance to the Granting Authority about the regularity of the costs claimed. The thresholds depend on the EU programme and type of action (see call conditions on the Topic page). For the Multi-Annual Financial Framework 2021-2027, there is usually a single threshold of EUR 325 000 requested EU contribution. The CFS must be uploaded as a scanned copy (PDF) together with the Financial Statement. The originals must be kept in your files.

VIII. Review meeting

A review meeting is meant to assess the work carried out over a given period, usually after the end of a reporting period. It usually lasts one day, and the exact date is agreed between the Project Officer and the Coordinator. The review is conducted by your Project Officer and one or more experts contracted by the European Commission.

For this, the entire consortium will prepare presentations on the progress of each work package and task.

IX. Closure of the project

At the end of your final reporting period, you will submit your final technical and financial report and have a final review meeting. When you get your final review report, that's where the Project Office declares the project closed, including the updates that might be still needed to the report or some deliverables.

X. Obligations beyond the project lifetime

There are a few standard obligations that you shouldn't forget, after the end of your project. An important one is the best effort obligation, according to which you still need to do your best to exploit and disseminate your project results, for 4 years after the end of the project. Other such obligations include confidentiality, record keeping, reviews and audits after the end of the project.