Nástroj pro řízení projektového konsorcia
Project Management Handbook

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Agenda

Řídící struktura projektu

Plán projektových prací

Spolupráce online

Řízení kvality výstupů

Řízení rizik

Monitoring a reportování

Finanční řízení a platby

Finanční pravidla a administrativní aspekty

Project Management Handbook or Plan?
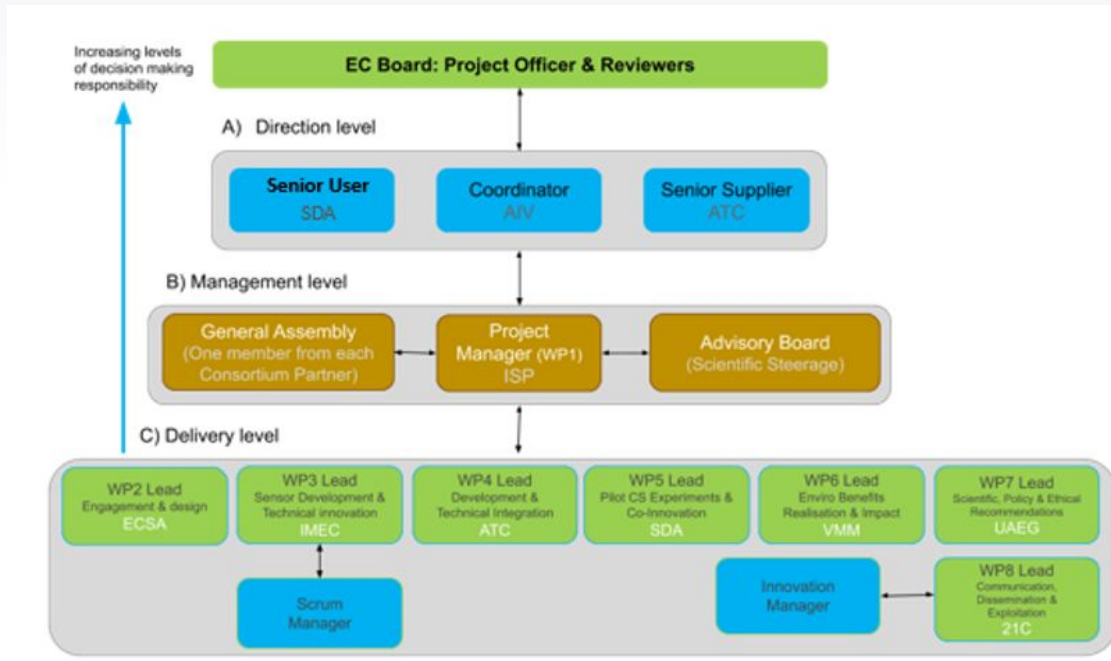
Handbook format not always used in HE projects:

- ▸ D1.1 Project management, quality assessment and financial plan
- ▸ D1.1 Project Management, Quality and Risk Management Plan
- ▸ etc.

Might be too formalistic and rigid -> **let's make it brief and practical**

Ukázka struktury PMH

Project Governance Structure

Project Governance Structure

Tip:
List the names of the responsible people

2.1. Project Organisation

The project organisation structure incorporates traditional project management workflows and roles with more modern development practices. The roles and responsibilities are assigned to the following personnel:

- Project Coordinator:
- Senior User:
- Senior Supplier:
- Project Manager:
- WP leads
  - WP1 lead:
  - WP2 lead:
  - WP3 lead:
  - WP4 lead:
  - WP5 lead:

Consortium Agreement

responsibilities and operational procedures of consortium bodies:

- ▶ General Assembly
- ▶ Coordinator
- ▶ Expert Panel / Advisory Board

Tip:
Use DESCA model CA. Section 6 deals with consortium bodies

Consider the Payment schedule (Section 7 Financial Provisions)

Work Plan

WP1: Project, Risk & Quality Management

WP2: Engagement & Design

WP6: Change & Enviro Benefits Impact

WP7: Ethics, Policy & Scientific Recommendations

WP3: Sensor & Technical Innovation

WP5: CS Experiments & Data Collection

WP4: Technical Integration

WP8: Communication, Dissemination & Exploitation

Key
- Mgmt
- Technical
- Citizen Science

Project Gantt Chart

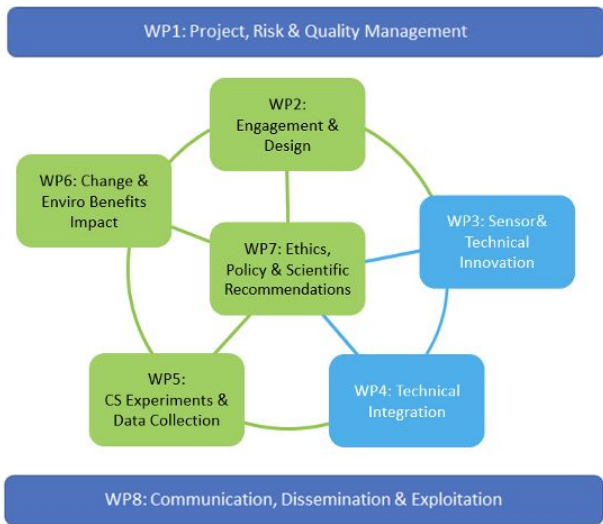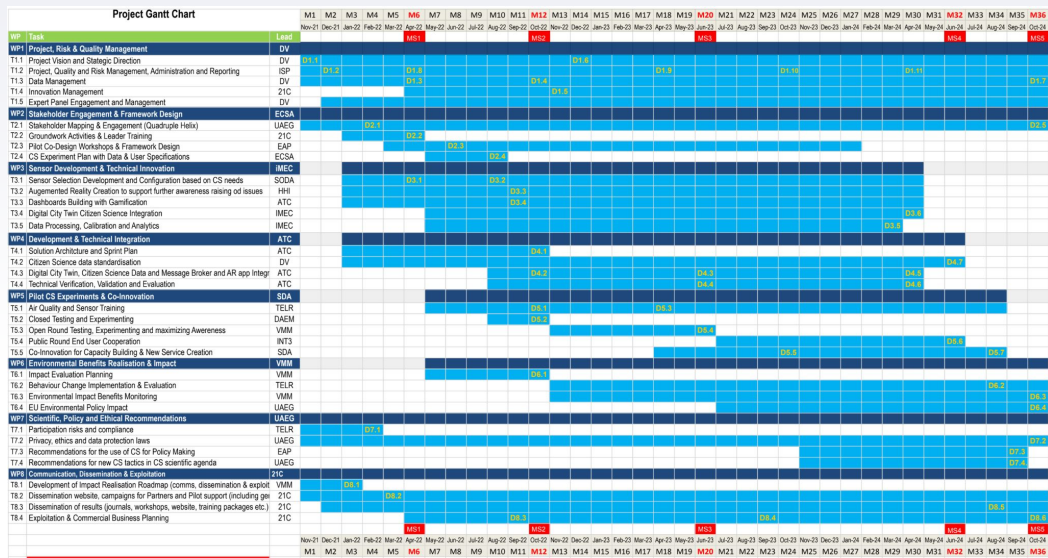| WP	Task	Lead
WP1	Project, Risk & Quality Management	DV
T1.1	Project Vision and Stategic Direction	DV
T1.2	Project, Quality and Risk Management, Administration and Reporting	ISP
T1.3	Data Management	DV
T1.4	Innovation Management	21C
T1.5	Expert Panel Engagement and Management	DV
WP2	Stakeholder Engagement & Framework Design	ECSA
T2.1	Stakeholder Mapping & Engagement (Quadruple Helix)	UAEG
T2.2	Groundwork Activities & Leader Training	21C
T2.3	Pilot Co-Design Workshops & Framework Design	EAP
T2.4	CS Experiment Plan with Data & User Specifications	ECSA
WP3	Sensor Development & Technical Innovation	IMEC
T3.1	Sensor Selection Development and Configuration based on CS needs	SODA
T3.2	Augemented Reality Creation to support further awareness raising od issues	HHI
T3.3	Dashboards Building with Gamification	ATC
T3.4	Digital City Twin Citizen Science Integration	IMEC
T3.5	Data Processing, Calibration and Analytics	IMEC
WP4	Development & Technical Integration	ATC
T4.1	Solution Architecture and Sprint Plan	ATC
T4.2	Citizen Science data standardisation	DV
T4.3	Digital City Twin, Citizen Science Data and Message Broker and AR app Integr	ATC
T4.4	Technical Verification, Validation and Evaluation	ATC
WP5	Pilot CS Experiments & Co-Innovation	SDA
T5.1	Air Quality and Sensor Training	TELR
T5.2	Closed Testing and Experimenting	DAEM
T5.3	Open Round Testing, Experimenting and maximizing Awereness	VMM
T5.4	Public Round End User Cooperation	INT3
T5.5	Co-Innovation for Capacity Building & New Service Creation	SDA
WP6	Environmental Benefits Realisation & Impact	VMM
T6.1	Impact Evaluation Planning	VMM
T6.2	Behaviour Change Implementation & Evaluation	TELR
T6.3	Environmental Impact Benefits Monitoring	VMM
T6.4	EU Environmental Policy Impact	UAEG
WP7	Scientific, Policy and Ethical Recommendations	UAEG
T7.1	Participation risks and compliance	TELR
T7.2	Privacy, ethics and data protection laws	UAEG
T7.3	Recommendations for the use of CS for Policy Making	EAP
T7.4	Recommendations for new CS tactics in CS scientific agenda	UAEG
WP8	Communication, Dissemination & Exploitation	21C
T8.1	Development of Impact Realisation Roadmap (comms, dissemination & exploit	VMM
T8.2	Dissemination website, campaigns for Partners and Pilot support (including ge	21C
T8.3	Dissemination of results (journals, workshops, website, training packages etc.)	21C
T8.4	Exploitation & Commercial Business Planning	21C

Tip:
Do not copy content from the DoA, Section A. Refer to it.

Performance Monitoring

▸ Monthly in Management Meetings

▸ Handbook provides timetable when performance monitoring will be performed, typically within

  ▹ periodic reports

  ▹ interim progress reports (if in place)

 ▹ full consortium meetings

Table: Success Criteria Reporting

Success Criteria Measurement No.	Project Month / Date	Reported to EC in
1	M12	internal
2	M18	**Periodic Report 1**
3	M24	internal
4	M36	**Periodic Report 2**

Performance Indicators monitoring

▶ regular progress monitoring in Management Meetings (monthly)

▶ formal KPIs status update every 6-12M

Tip:
status of the success criteria is updated yearly in the consortium's internal online spreadsheet that is stored in the shared *00 Project dashboards* folder

(DoA) Change Management

Table: Examples of changes
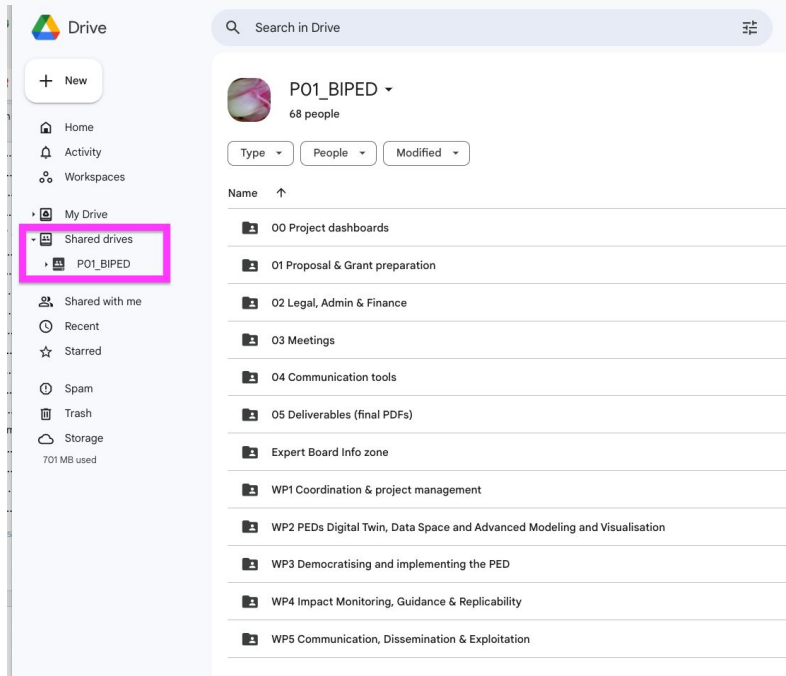
Example of a change that does <u>not</u> need to be a subject of the RFC	Example of a change that needs to be a subject of the RFC
A Beneficiary requests to shift 1 person-month from one task to another across WPs in order to provide his expertise for one of the deliverables where his involvement was not originally planned. Such a change does not require any approval.	Due to unforeseen circumstances the deliverable lead lags behind the schedule of deliverable drafting. He requests the Coordinator and Project Manager for an extension of two weeks (with a justification) to allow him to deliver a report of an expected quality.
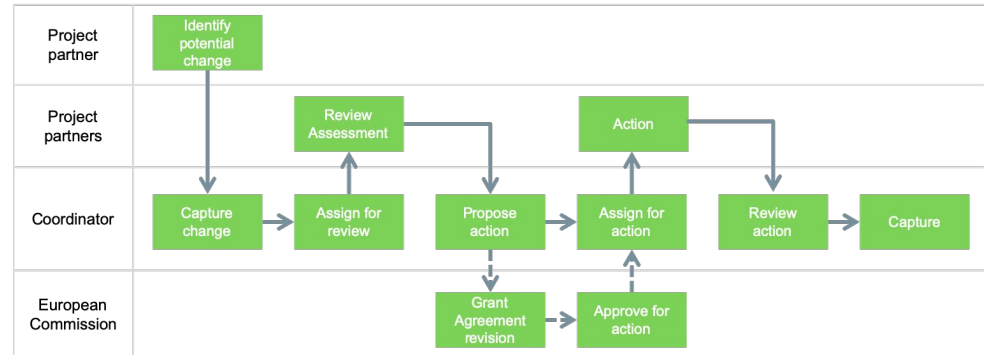
Conflict Resolution

1. Conflicts related to technical and implementation

   -> Management Meetings

2. Major Conflicts involving changes to the GA

   -> General Assembly according to the procedures define in the CA

Online collaboration

Google Workspace

MS Teams + Sharepoint

Tips:
For the sake of an effective collaboration, the whole team is requested to

► always upload all the documents to the Drive starting already with their early drafts version,

► use the online editing tools when working on all project documents.

Project Dashboards

P01_BIPED > 00 Project dashboards ▾

Type ▾   People ▾   Modified ▾

Name ↑

PDF	BIPED budget.pdf
	BIPED contact list 👥
	BIPED Critical Implementation Risks
	BIPED Deliverables & reviewers
PDF	BIPED Gantt.pdf
	BIPED Key Performance Indicators
PDF	BIPED person-months per task.pdf
	BIPED Stakeholders & Dissemination Database
	BIPED tasks+budget

The **00 Project dashboards** folder contains key project documents such as contact list, budget, gantt, resources allocation, critical risk, the list of deliverables' and its reviewers etc.

Document templates

P01_BIPED › 04 Communication tools › 02 Document templates ▾

Type ▾   People ▾   Modified ▾

Name ↑	Last mo... ▾	File size
📄 2024-MM-DD_meeting_name-meeting_minutes	Jan 31, 2024 me	11 KB
W BIPED_Dx.x_name (deliverable template).docx	5:59 PM me	1.9 MB
🟨 biped-presentation_template	Jan 3, 2024 hugo@digitalre...	13 KB
P biped-presentation_template.pptx	Jan 3, 2024 hugo@digitalre...	8.3 MB

Mailing lists Calendar

- Contact list
- Mailing lists example
  - all
  - pilots team
  - technical team
- Shared project calendar (ical invitation)

Meetings

- **Consortium meetings / General Assembly**
  - ▷ online vs. face-to-face (1x year)
  - ▷ focus on collaboration, interactivity and discussion (no long presentations)
  - ▷ need to have well defined agenda
- **regular online meetings**
  - ▷ we prefer per topic (Management, technical, pilot) rather than formalistic per WP -> break WP silos
  - ▷ fixed time slot every week / month

Other (used/useful?) tools

- **Co-create** online: Miro
- **Agile Project Management**: Basecamp, Jira, Youtrack, Trello, Asana, Todoist
- **PM Dashboards** in MS Teams, MS Power BI
- **Chat**: Skype, Slack, WhatsApp
- **AI**-**generators** for meeting minutes and follow-up actions
- **Emdesk**
- **Time tracking**: Clockify apod.
- **Code** repository: GitLab, GitHub

Deliverable Quality Management

Deliverable Template

BIPED_Dx.x_name (deliverable template) .DOCX

File   Edit   View   Insert   Format   Tools   Help

%DX DELIVERABLE%

%One sentence about the deliverable%

Project name	BIPED: Building Intelligent Positive Energy Districts
Duration	January 2024 – December 2026
Project ID	101139060
Coordinator	Technical University of Denmark
Type of action	Innovation Action
Call ID	HORIZON-MISS-2023-CIT-01
Website	https://www.bi-ped.eu/
Document name	%DX deliverable%
Document status	Final
Delivery date	Date
Dissemination	Public/Confidential
Authors	Name Surname (ORG)
	Name Surname (ORG)
	Name Surname (ORG)

Funded by the European Union

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1

%DX deliverable%

Document history

Version	Date	Contributor	Description
0.1	01.01.2024	Name Surname (ORG)	First draft
0.2	01.01.2024	Name Surname (ORG)	Review
0.3			
1.0			

2

Executive Summary, Introduction, Conclusion

Executive summary

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris lacinia purus justo, ac sollicitudin nulla euismod et. Aenean sodales, eros vestibulum tempor accumsan, turpis turpis laoreet turpis, luctus sagittis dolor lacus rutrum tortor.

Please note:
Executive summary is not a simple overview of the deliverable structure.
Executive summary is an overview of all the deliverable content, highlighting key points by outlining its

- *context / motivation,*
- *purpose / problem statement or any relevant background information,*
- *approach / methodology,*
- *results & main findings, and*
- *conclusions and recommendations.*

Please limit the executive summary up to 1 page max.

After reading the executive summary, the reader should become acquainted with the material (including its main findings) without having to read it all.

1. Introduction

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris lacinia purus justo, ac sollicitudin nulla euismod et. Aenean sodales, eros vestibulum tempor accumsan, turpis turpis laoreet turpis, luctus sagittis dolor lacus rutrum tortor.

Please note:
A good Introduction does four things:
2. *introduces the problem and motivation for the deliverable,*
3. *provides a brief summary of previous work on the topic and/or context in relation to the other project tasks/deliverables,*
4. *outlines the purpose and specific objectives of the deliverable for the project,*
5. *provides a 'road map' for the rest of the deliverable, describes (in approximately one sentence each) the contents of each of the deliverable chapters.*
What doesn't go in your Introduction?
Never put any results or decisions in the Introduction. Just because you are writing it last doesn't mean you should give away the story. After all – it's called the "Introduction" for a reason.

7. Conclusion

7.1. Text

7.1.1. Text

7.1.1.1. Text

7.1.1.1.1. Text

7.1.1.1.1.1. Text

Please note:
The purpose of the conclusions is to provide a summary of the whole report. In this context, it is similar to the Executive Summary, except that the Executive Summary puts roughly equal weight on all report chapters, whereas the Conclusions chapter focuses primarily on the findings, conclusions and/or recommendations of the project.

Deliverable Quality Management

5 weeks	2 weeks	1 week

ToC	Deliverable drafting	Deliverable Peer Review	Deliverable Approval

Started	Draft	Consolidated	Review	2nd Draft	Peer Review	Final Draft	Consortium review	Final Editing & Approved	Submitted

Tips:

▶ List of reviewers for each deliverable is available in the 00 Project Dashboards folder (min 2 for each deliverable)

▶ It is strongly recommended to involve reviewers in the deliverable drafting process as soon as an early draft

▶ All the reviewers comments shall be provided in the 'suggesting' mode and via online comments directly in the Google Docs online version

Risk Management

Continuous Risk Management Approach

Identify

Analyse

Communicate

Control

Track

Plan

Risk exposure assessment matrix

IMPACT	LIKELIHOOD		
	likely	possible	unlikely
severe	critical	critical	moderate
moderate	critical	moderate	low
minor	moderate	low	low

Tip:
- regular risk assessment at least yearly, kept in online sheet
- results reported to the EC in Periodic reports (and Interim reports if defined)

Progress Monitoring and Reporting

- regularly on monthly basis in Management Meetings
- Funding & Tenders Portal
  - Continuous reporting
  - Periodic Progress Reporting
- Technical Review
  - preference for in-person
  - rigorous preparation

Dissemination Reporting

Tip:
All partners report their dissemination actions regularly in the *Stakeholders & Dissemination Database* stored in *00 Project Dashboards*

- ▸ Dissemination assets and templates
  - ▹ keep them updated and online
- ▸ Reporting dissemination activities
  - ▹ all, regularly in online sheet

☰	KPI Status ▾	Events attended/planned ▾	Potential relevant events ▾	Publications ▾	Clustering ▾

Partner Blog List ▾	FB groups & posts ▾	Linkedin groups & posts ▾	Social Media Handles ▾

This is a tracking tool to report on events ATTENDED by partners to present/promote BIPED, or events for which preparation is underway							
Date event	**Event name**	**Place:** city or online	**Partners attending**	**Presentation (Y/N)**	**Activity description**	**Contacts per event, total no. people learning about BIPED:** this may include people who saw printed material, listened to speech, attended workshop, interacted during networking etc.	**Comments:** feel free to provide any feedback received on BIPED, overall assessment, critical remarks, new clustering opportunities etc.

Financial Statements
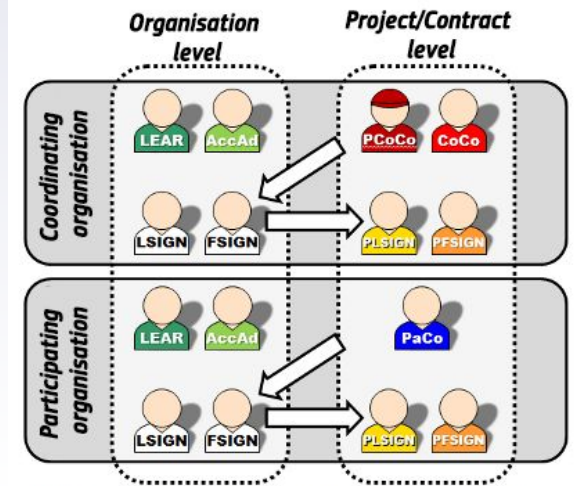
Assigning FSIGN role

Figure 5 - Appointment of LSIGNs and FSIGNs to a specific project

Grant Payments Schedule

An *interim payment*

When
- 90 days from reception of periodic reports

How much
- EU contribution corresponding to the eligible costs incurred in the reporting period
- Limit = 90 % of the maximum grant amount

Characteristics
- Ineligible costs will be rejected and not taken into account for the payment

A *payment of the balance*

When
- 90 days from reception of final reports

How much
- Reimburses the remaining part of the eligible cost incurred
- Includes the release of the Guarantee Fund (GF)

Overview of Financial and Administration Rules

Basic overview

- Cost types
- Personnel Costs & Timesheets
- Purchase costs
  - travel
  - equipment
  - other goods and services
- Subcontracting
- Purchase of goods, works or services – 'Subcontracting' vs. 'Other goods, works, services'
- Keeping records

Tip:
Costs falling under 'Other goods, works, services' are by definition smaller cost items. If a service or goods is planned to be purchased which is of a bigger value and is not planned in the DoA as an action task, the purchase might be considered as a 'new' subcontract and shall be first approved with the EC.

Certificate on the Financial Statements

- Beneficiaries requesting a total contribution ≥ 430,000 EUR must accompany their final financial statement by a CFS
- The CFS is only submitted once at the end of the project together with the final financial report.

Tip:
Explicitly name partners to which the CFS obligation might apply

Useful Documents

Provide direct links to useful documents

11. **Useful Documents**

BIPED Grant Agreement
- stored at BIPED/02 Legal, Admin & Finance/01 GA

BIPED Consortium Agreement
- stored at BIPED/02 Legal, Admin & Finance/02 CA

Horizon Europe Online Manual

Horizon Europe Annotated Model Grant Agreement

Conclusions

Handbook: what I would not recommend

▸ being too formalistic, generic and lengthy

  –> **better to be brief and practical**

▸ being overly complicated with too many project management and communication tools

  –> keep it simple

▸ copying content from DoA
  ▹ e.g. Gantt, milestones, WP tables, list of deliverables etc
▸ copying content from Consortium Agreement

  –> only link to these documents

- Explain these project management procedures again and again. Help and support.
- Be professional. Set example.
- Insist that everyone follows the rules. No exceptions.
- After 1 year, most will comply. Collaboration will become smooth.

Everyone will appreciate how efficiently the project is managed.

Thank you

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