

# Project management: tips and tools for monitoring your project

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- 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

- 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?

### **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

### ***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

### ***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

### ***For project partners:***

#### ***Quick visual overview:***

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

#### ***Status:***

- deliverables
- milestones

### ***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	UITP - Strategic Business plan : project budgets									
	Full project				Reporting period 1		Reporting period 2		Reports	
Work sections	(01/10/2010 > 30/09/2013)	PM	Deadline	ST	PL	AC	PL	AC		
Discussion forum	• D4.1 - Online management tool for profiles & ...	1.50	31/03/2011	-	1.50	1.63		0.63	1 2	
My agenda	• D6.1 - Website, online 'helpdesk', FAQ-secti...	2.60	31/03/2011	-	2.10	4.52	0.50	0.77	1 2	
Search	• D1.2 - 7 Virtual trainings	0.10	31/03/2012	-	0.05	0.07	0.05	0.00	1 2	
Register a new user	• D3.2 - 2 Strategy trainings for high-tech SME...	0.10	31/03/2012	-	0.05	0.12	0.05	0.00	1 2	
My info	• D4.2 - Report on 1200 SME profiles & on conta...	2.50	31/03/2012	-	1.25	1.02	1.25	0.16	1 2	
Users' guide	• D4.3 - Report on 2 Virtual Brokerage Events a...	4.00	31/03/2012	-	2.00	2.18	2.00	1.46	1 2	
Public website	• D6.2 - Report on PR & on cooperation and netw...	1.10	31/03/2012	-	0.55	0.82	0.55	0.06	1 2	
Home	• D6.3 - Preparation of 10 Success Stories of F...	1.00	31/03/2012	-	0.50	0.40	0.50	0.00	1 2	
COORDINATOR	• 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	
Manage projects	• D3.1 - Report on guidelines, 1 internal onlin...	0.20	30/09/2012	-	0.15	0.06	0.05	0.03	1 2	
Manage members	• D3.3 - Report on 1 SME Strategy Conference an...	0.10	30/09/2013	-	0.05	0.06	0.05	0.00	1 2	
Manage calendars	<b>Total of Person Months used: 14.40 - Allowed: 13.70</b>				<b>8.45</b>	<b>11.23</b>	<b>5.25</b>	<b>3.17</b>		

**i** 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

### ***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



- Project-internal monitoring processes
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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

## 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!**

## Take home messages

- 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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