Coordinating Technical Periodic Reporting – example from 3-4 years projects with large (>20 partners), multidisciplinary consortia and work structured in main core research themes (CT) subdivided in Work Packages (WP)

Please note this document will possibly need to be adapted should your project structure differ. The central aim is to distribute the workload as evenly as possible among those competent to quality control the report, besides making the process as smooth and quick as possible.

Guidelines for Project Manager / project office

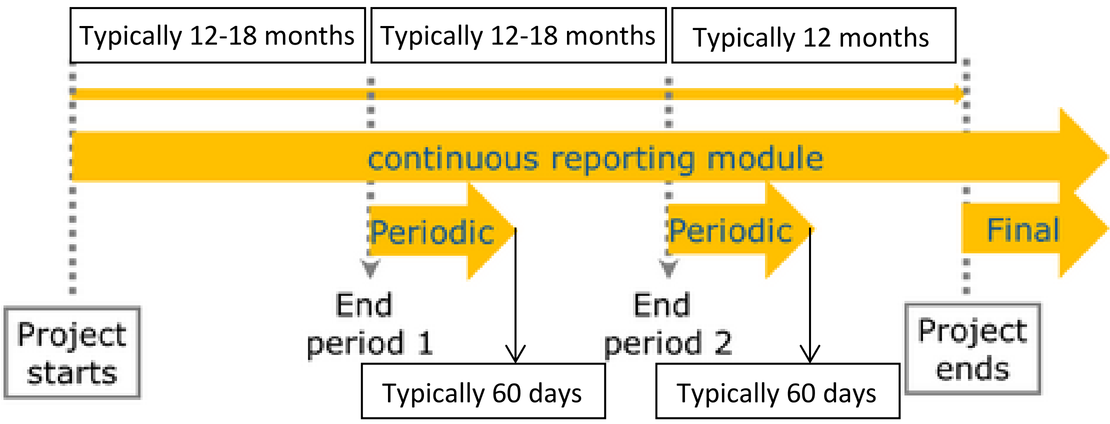

Figure 1. Schematics of reporting for EU H2020-funded project. Adapted from H2020 Online Manual

- *Preferably at the start of the project*, and certainly a few months before the first period ends, the project manager prepares a private space or intranet to be shared only by the consortium. This is typically a page of the project website, a wiki or an open-source project management software. It will contain reporting templates, Instructions & Guidelines for consortium for preparing the report, and relevant documents such as the Description of Action (Annex I), the Consortium Agreement, the Estimated Budget for the Action (Annex II), the data management plan, the plan for exploitation and dissemination of results, the last periodic report's review (when available), contacts list, etc.
- *3 months before the end of the period*, the project manager reminds the entire consortium when reporting period ends and asks to prepare accordingly, specifically, to designate a delegate or provide information in advance if anyone believes they will not be available at request (*e.g.* fieldwork, leave of absence, etc.). The timeline for reporting can already be included in this reminder, and a link to the project intranet.
- *1 month before the end of the period*, the project manager sends all PIs a reminder to update all relevant sections of part A of the technical report (continuous reporting)[1]. We recommend sending out templates to collect this information and return to the project manager within a specified deadline (*e.g.* last day of period). The manager then ideally has time to update the Part A sections on the portal whilst the WP leaders are compiling their part of the Core Report (Technical Report- Part B).

[1] Except for the Summary for Publication, which is easier to update once you have received input for the Core Report – Part B of technical report.

- *1 month before the end of the reporting period*, the project manager also sends the Instructions & Guidelines for consortium and report template[2] to the WP leaders and the CT leaders. The project manager informs the WP leaders that they are responsible for collecting and compiling the necessary input from each of the PIs involved in their WP.
- Allow at least 1 month before the submission deadline to the Commission for the Coordinator / project office to compile, review and edit all input for the Core Report and for updating of the Summary for Publication (Part A of the Periodic Technical Report).
- The Coordinator should aim to finish the summary for publication 2 weeks before the submission deadline for cross-verification and approval by CT and/or WP leaders.
- Stay in close contact with the financial department and allow time for verification of compatibility between the financial and technical parts of the periodic report. Expect some backwards and forwards with some beneficiaries at this stage.

[2] This will be made available on the participant portal when the period ends.

Instructions & Guidelines for consortium

IMPORTANT CONTACTS AND LINKS:

[provide here a link to project intranet, the contact details of the project manager/project office, the dissemination WP leader (if this is the person collecting relevant info for Part A), and the financial manager]

IMPORTANT DATES:

PIs Deadline for sending Part A contributions to project office/manager (PO) and respective WP leaders	*[End date of period]*
PIs Deadline for sending Part B contributions to WP leaders*	*[End date of period]**
WP leader Deadline for sending Part B to CT leaders (**cc PO**)	*[15 days later]*
CT leaders Deadline for sending Part B to coordinator	*[22-25 days later]*
Deadline Financial Report (Forms C, use of resources)	*[determined by finance department]*
Submission deadline to Commission	*[52-55 days later / at least 1 day before Commission deadline]*

* this deadline can be determined by the WP leader. The project office/project manager should remind the WP leader to inform their PIs in due time, e.g. a month in advance.

STRUCTURE OF THE CORE REPORT:

1.1 Objectives

1.2 Explanation of the work carried out per WP

1.3 Impact

2. Update of plan for exploitation and dissemination of results

3. Update of data management plan

4. Follow-up of recommendations and comments from previous review(s)

5.1 Deviations in terms of tasks

5.2 Deviations in terms of use of resources

GUIDELINES FOR PIs AND WP LEADERS

Provide a <u>concise</u> overview of the progress of your work in line with the DoA (Annex I – description of work). Do not repeat the DoA, but report on progress made and any difficulties encountered as well as solutions to overcome them. You are welcome to refer to deliverable reports, project publications and dissemination actions, rather than repeating their content in the report:

For section 1.1-1.3, provide per WP a brief summary of work that should not exceed 4-5 pages (including at least 1 figure, excluding references), including the following:

- Work package objectives for the period [DD.MM.YYYY – DD.MM.YYYY]
- Short introductory paragraph highlighting key experiments and results (ca 100-200 words)
- Summary of progress towards objectives highlighting clearly significant results in bold. Consider tasks, deliverables and milestones. Please organise the work descriptions according to tasks and/or deliverables, not beneficiaries. However be sure to make each beneficiary's contribution clear.
- Special emphasis should be made to any novel aspects, new activities and/or collaborations, synergies with other projects or programmes, capacity development activities and any established links with stakeholders and or policy-makers, direct or indirectly.
- VERY IMPORTANT: please report on RESULTS (even preliminary ones) and refer to PROJECT publications, deliverable reports, milestones and other dissemination activities.

For sections 2-4, provide input only if applicable. Check documentation on the project intranet.

For section 5, if applicable, explain the reason for deviations from the DoA, the consequences and propose corrective actions. That is, include explanations for tasks not fully implemented, critical objectives not fully achieved and/or not being on schedule; explain the impact this has on other tasks and/or the available resources and planning.

GUIDELINES FOR CT LEADERS

Review and correct (if necessary) the WP reports delivered by the WP leaders for your CT and send to project office.

Please write, in an easily understandable by a general audience, containing no confidential data, and no longer than 2 pages:

- Summary of the context of the CT and overall objectives, detailing those for the reporting period;
- Work performed during the period covered by the report and main results achieved;
- Progress beyond the state of the art and expected potential impact (including the socio-economic impact and the wider societal implications of the CT so far)