



Grant Agreement 101079792, RESILIENCE PPP

# D6.2 Templates and guidelines for the monitoring, reporting and management activities

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### Change History

Version Number	Date	Status	Name	Summary of Main Changes
1	28/09/2022	DRAFT	RESILIENCE_WP6_Templates_and_guidelines_1_DRAFT	
1	09/11/2022	REVISED	RESILIENCE_WP6_Templates_and_guidelines_1_REVISED	Addition of details concerning the monitoring system, addition of tables
02.00	18/11/2022	FINAL	RESILIENCE_WP6_Templates_and_guidelines_02.00_FINAL	Revisions suggested by BOK, ASN, BOD

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### Distribution List

Name	Beneficiary	Role
WP team members, BoD, SCC	Various	Various



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## 1 Introduction

D6.2 is included in the project as a document collecting all documents for financial, effort, and reporting monitoring that are produced by the Project Coordinator, shared among and explained to partners to support the project performance.

This is the result of an exchange between the Project Coordinator, the WP6 team members, and the RESILIENCE Service Coordination Committee (SCC), composed of all Work Package (WP) and Work Unit (WU) leaders.

## 2 Financial and effort monitoring

During the past years, most partners of the present consortium worked on projects that funded the ideation and planning of the RI. The lessons learned thanks to the management experience of those projects show that

- a) not all partners have efficient internal monitoring systems and/or have experience on how to report efforts during the project's life;
- b) it is important to ensure that the effort foreseen in each task is actually deployed, and that deviations are identified and balanced on time;
- c) the funding received by the Commission is the budget is fully utilized for the realization of the project and according to the different management plans (e.g. Detailed Organisational Plan) and structures (e.g. Work Breakdown Structure).

Therefore, the Financial Officer of the Project Coordinator made available for all partners an effort monitoring dashboard (see Table 1) including:

- a) a summary of the staff effort, with an indication of the foreseen effort visualized in days and person/months;
- b) a task list to be filled out every semester by every consortium partner.

The Financial Officer proposed the use of the Six-Month monitoring report that each partner must fill in with its own data. Each semester (by the 20th of the following month) the partners will upload the file with the effort incurred up to that time into the shared folders created for this purpose. The Financial Officer already



M24-31/05/2024 (upload by 20/06/2024)

M30-30/11/2024 (upload by 20/12/2024)

M36-31/05/2025 (upload by 20/06/2025)

M42-30/11/2025 (upload by 20/12/2025)

Report	Content	Responsible	Distribution	Periodicity	Due Date
<b>Six- Month monitoring report</b>	Project progress and technical activities carried out by each partner. Includes costs and efforts for each partner.	ALL PARTNERS	INTERNAL	Every 6 months (M6 - M12-M18 - M24 - M30- M36 - M42)	30/11/2022 - 31/05/2023- 30/11/2023 - 31/05/2024 - 30/11/2024 - 31/05/2025 - 30/11/2025

Table 2: Monitoring timing

### 3 Reporting

According to the Grant Agreement, RESILIENCE PPP will submit three periodic reports, at M12, M30 and M48. The template of the report will be offered in due time by the European Commission through its web portal, but it is not clear if the Commission will use the same template as in the previous Work Programme, so there is no template available to be included in the present deliverable.

Trainings about reporting activities have already been successfully provided by the management team of this project in the past years and the recordings are available to partners through the project’s shared folders system. Nonetheless, considering the change of Framework Programme and the role played by the European Research Executive Agency, new trainings will be offered at least two months in advance before the closing of the periodic report, for those partners that cannot benefit from an internal office in charge of the financial reporting of the European projects and for those in charge of the project’s technical development, who will support WP6 team members in the drafting of the report. Trainings will be about both the technical and financial reports. During the training, partners will also receive information about how to contribute to the drafting of the technical report. Moreover, they will be recorded and the video recording will be used as learning material for new staff joining the project.

## 4 Monthly meetings

Besides the regular meetings that are fixed and managed by each body of the RESILIENCE governance structure, the Project Coordinator proposed to the members of the SCC to take part to a monthly meeting, which is conceived as the place where WP and WU leaders share most relevant information about what they achieved in the previous month and plan to do in the following 30 days. Besides the WP and WU leaders, all RESILIENCE members are invited to join. This meeting is also the place where the different WPs and WUs have the opportunity to talk about initiatives to be taken all together, or in small groups. Following the mix of traditional and agile management approaches that is chosen for the RESILIENCE PPP, the monthly meeting is the place where to

- a) understand what other teams are doing, developing, organizing;
- b) launch new ideas and inputs, which are then treated at length during separated meetings and in dedicated emails;
- c) report on deviations, delays, possible risks;
- d) take decisions regarding the management of the teams' activities, in terms of coordination
- e) listen to the needs of the different teams and find shared solutions, when possible (e.g. when it is not a given prerogative of the Project Coordinator/WP6 to handle them).

Monthly meetings usually last about an hour, but for the first six months of the project, a slot of at least 1,5 hours is foreseen.

## 5 Communication and sharing of information

The communication flow regarding the financial and effort monitoring is managed by the Financial Officer of the Project coordinator, who ensures that all partners have access to the information regarding

- a) how to effectively support the monitoring of the project during its whole life and
- b) how to correctly report to the European Commission.

Communications regarding the general reporting of the project, particularly towards the European Commission, are managed by the WP6 Leader and the Project coordinator. Upon the request of most members of the RESILIENCE SCC, the Project Coordinator created and shared with all members of each consortium partner the project's shared folders system, containing all relevant official (e.g. the Grant

Agreement) and supporting documents (e.g. templates, best practices for the WP activities and management), videos and guidelines for the reporting activities of the project.

Additionally, the Project Coordinator proposed to all SCC members to make use of a common management software. Such a software should make management easier at the different levels, while also offering the chance to see the progress in the various tasks and activities and the activities and events scheduled throughout time, to take part in discussions taking place in asynchronous mode, contributing to the whole life of the project, beyond the boundaries of the single WP or WU. To date, *Clickup.com* is the proposed cloud service and will be used for two months by the SCC members. After the trial, it will be adopted or rejected.



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