



Project Reporting

for the EuCARD Integrating Activity Project

Based on:

- Provisions of the Grant Agreement (GA) and its annexes
- FP7 Guide on Project Reporting
- EuCARD Consortium Agreement (CA)

Acronyms used:

- PC = Project Coordinator
- SC = Steering Committee
- GB = Governing Board

Project reporting lines

There will be two project reporting lines in EuCARD:

- **External**, covering the preparation and submission of the Periodic Reports to the EC, as well as the Deliverable Reports specified in the Grant Agreement (Annex 1).
- **Internal**, with 6-month periodicity, serving:
 - (i) as necessary input for the preparation of the Periodic Reports.
 - (ii) as means for the Coordinator, Steering Committee and the Governing Board to follow up the progress of the project, and in case of problems, to take adequate measures on time, if necessary.

Interim Activity Reports

Purpose: to allow the SC and GB to follow up the progress of the project.

Content (based on the content of the Periodic Reports to the EC)

1. A brief description of the work performed on the Task, achievements, problems encountered and corrective actions taken, as well as any major deviations from the original DoW.
2. Description of progress towards Project Deliverables and Milestones, and expected delays, if any, as well as reasons for such delays.
3. Plans for the work to be completed during the next 6-month period.
4. Estimate of the man-power efforts of the beneficiaries involved in that Task

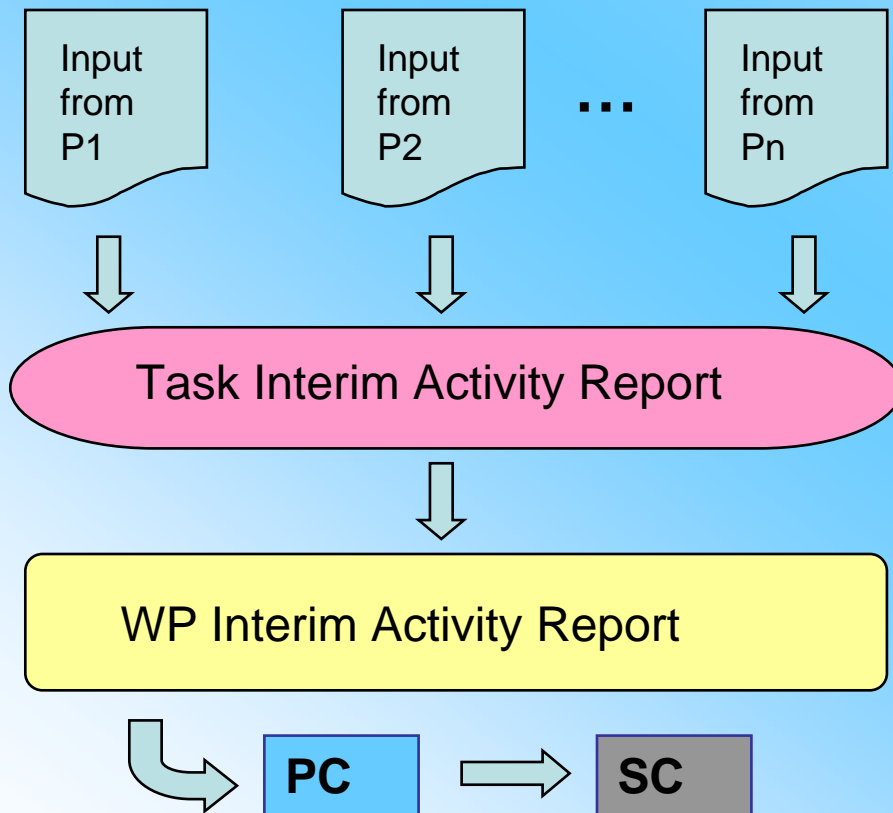
Total length of the IAR: 2-4 pages per Task

Example of 4:

	Used person-months *
Partner 1	80%
Partner 2	120%

* Relative to the internal planning of each participant.

Interim Activity Reports (every 6 months, "S" for Semester)



S1 = 30 September 2009

Contact persons from each participant for each Task

Task Coordinator prepares the IAR for his/her Task (S+10)

WP Coordinator(s) assemble the IAR for their WP (S+20)

Project Coordinator verifies the WP IARs and sends them to the SC (S+30)

Interim Resource Utilisation Summaries

Purpose:

To allow the Coordinator and GB to monitor the utilisation of project resources

Content:

(Similar to the justification for the Financial Statements due for the Periodic Reports to the EC):

overview of the budget situation of each participant – **estimated** actual expenditure (full costs) per Work Package, and if possible by Task, for the different cost categories, with a brief explanation for the major expenditure items:

- personnel, including person-months used,
- equipment and materials,
- travel,
- other direct costs.

Interim Resource Utilisation Summaries

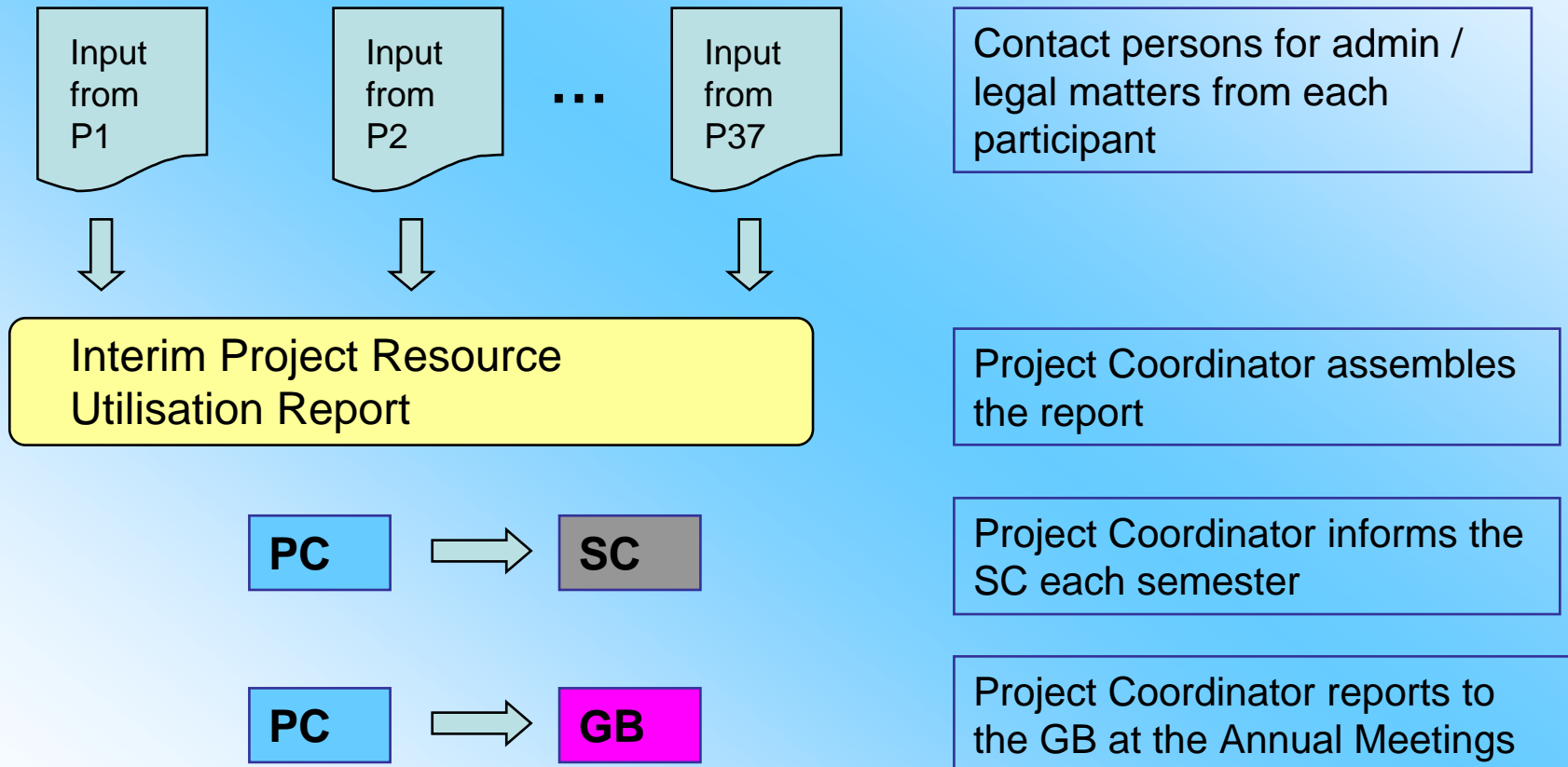
Example:

WP / Task	Cost category	Estimated expenditure	Justification	
WP.X	Personnel	66 k€	Staff involved	Person-months
			<ul style="list-style-type: none"> - one engineer, part-time - one post-doc fellow at 100% FTE - 2 PhD students at 100% FTE 	<ul style="list-style-type: none"> 2.5 p-m 6.0 p-m 12.0 p-m
WP.X	Equipment and materials	24 k€	<ul style="list-style-type: none"> - one test stand (15 k€) - hardware components (5 k€) - consumables (4 k€) 	
WP.X	Travel	5 k€	<ul style="list-style-type: none"> - 2 trips for WP meetings - 1 trip for SC meeting - 1 trip for GB meeting 	
WP.X	Other direct costs	12 k€	<ul style="list-style-type: none"> - organisation of one workshop (5 k€) - transnational access costs (7 k€) 	

Comments to the Interim Resource Utilisation Summaries

- The Resource Utilisation Summaries will be cumulative, covering the last and all previous 6-month periods. They will need to be validated by the finance department (service) of each participant only for the periods coinciding with the Periodic Reports to the Commission (M18, M36 and M48).
- Only a fraction of the costs indicated in the Resource Utilisation Summaries of M18, M36 and M48 may be used for the Financial Statements that will be sent to the EC (a fraction sufficient to justify the requested EC contribution for each participant).
- The Resource Utilisation Summaries will be used by the Coordinator and by the Governing Board for monitoring the use of resources and the budget expenditure profile of the participants, and of the Project as a whole.

Interim Resource Utilisation Summaries (every 6 months)



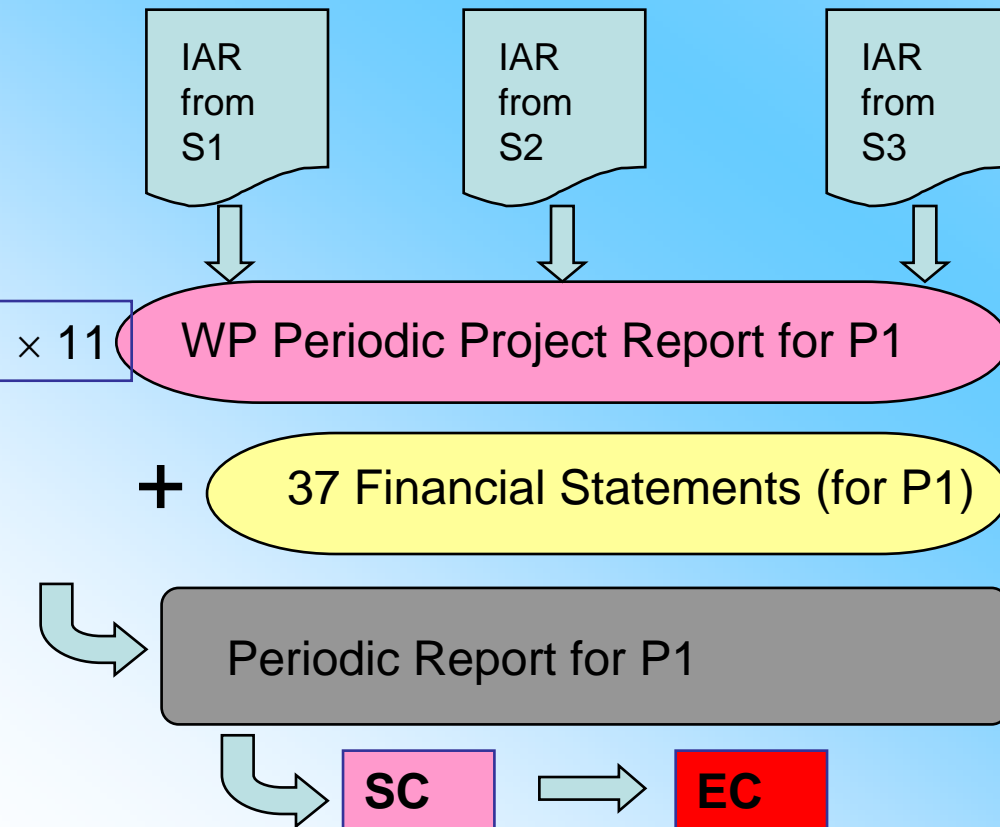
Periodic Reports must be sent to the EC at the end of each reporting period (P) – M18, M36, M48 (+2 months for the preparation)

Content of the Periodic (and Final) Reports:

1. A publishable summary
2. Overview of objectives and achievements of the whole Project for the period
3. Work progress and achievements for each Work Package and Task
4. Review of Project Deliverables and milestones
5. Project management activities
6. Explanation of the use of resources by the participants during the reporting period (per Work Package and per beneficiary)
7. Financial Statements – Form C (signed by each beneficiary)
8. Summary financial report

Periodic Reports: workflow for preparation

S1 = semester 1 (6m)
P1 = period 1 (18m)



WP Coordinators use the previous (and current) IARs and produce a WP Periodic Project Report (P+20).

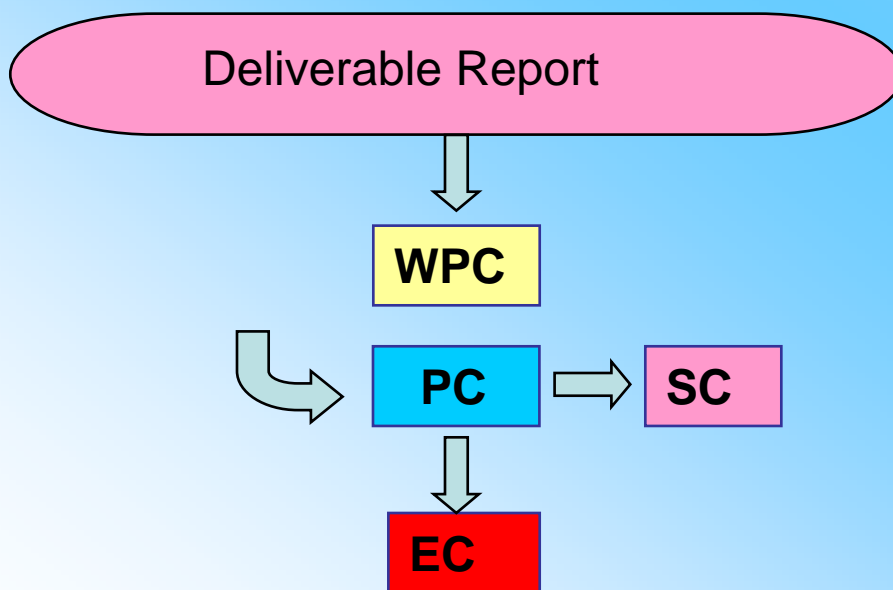
Each participant prepares the Cost Statement for P1, including justification of resources per WP (P+30).

The Coordinator prepares the Periodic Report, sends it to the SC for approval (P+50), and then submits to the EC.

Deliverables Reports

Deliverable Reports: committed contractual output of the project and must be sent to the EC according to the timetable indicated in Annex 1 of the GA.

* N.B. Each Deliverable has to be associated with a written report, regardless of its nature, e.g. web-site, device, specification, etc.



Task Coordinators assemble and produce the Deliverable Reports. (due date of Annex 1 + 10 days)

WP Coordinators review and validate each DR within 10 days after its receipt.

The Project Coordinator sends the DR to the SC for review and approval, and then submits the DR to the EC.

Project Reporting: Conclusions

- The **success of an EU project** is measured by the EC by acceptance (or rejection) of the Periodic and Deliverable Reports, not by its results. Commitment and cooperation from all participants, as well as Task and WP Coordinators will be essential for successful EuCARD reporting.
- The **internal project reporting line** will help the consortium and the Coordinator in the preparation of the Periodic (and Final) Reports.
- The **internal project reporting** will also allow the Coordinator, the Steering Committee and the Governing Board to follow-up the progress of the project and the utilization of resources.
- The preparation of the **Periodic Reports** is responsibility of the Coordinator with necessary input by all WP Coordinators (through the WP Periodic Reports) and by each participant (through the Financial Statements).
- The preparation of the **Deliverable Reports** is responsibility of the Task Coordinators and the WP Coordinators with input from all contributing participants.
- The Coordination Office will endeavour to ensure efficient follow-up and monitoring of the progress of the project, keeping the reporting workload at a reasonable level.