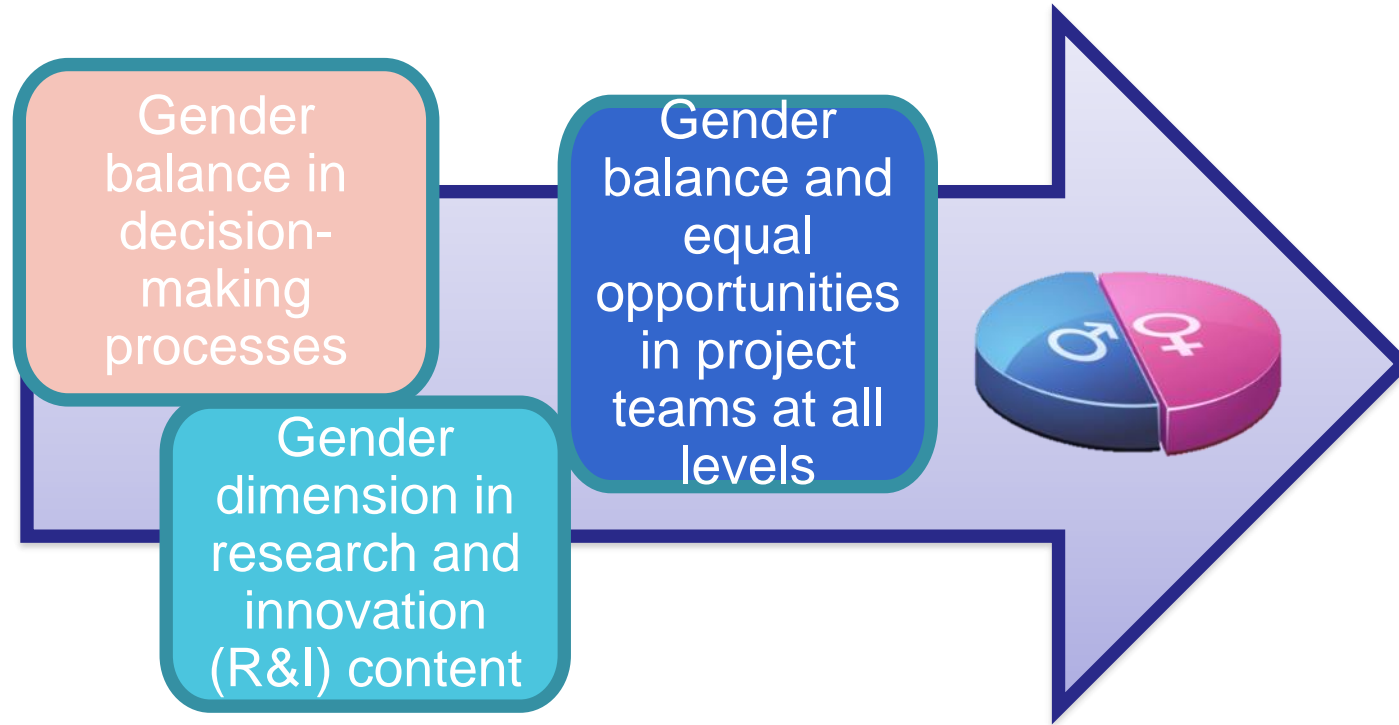# Implementation & reporting

PROJECT IMPLEMENTATION – best practices

- ✓ Keep the **REA Project Officer informed** about the implementation issues (agree with him/her on frequency/form of updates)

- ✓ **Discuss problems/changes** well **in advance** and do not wait until the end of project

- ✓ When there are doubts, **ask questions and provide details** to REA Project Officer

- ✓ As Coordinator, **request regular updates from consortium** on implementation aspects (e.g. reporting period of 18 months = regular updates in months 6, 12,18)

- ✓ Your project is part of a bigger picture - **establish links and collaborations** with other projects and initiatives at all levels (global, European, national, regional, local)

- ✓ Act as an **Ambassador for EU Research and Innovation**

- ✓ **Value your project results** - if the results are not used, the expected impacts cannot be achieved

- ✓ **Identify key exploitable results or outputs** which can be used and create impact, either by project partners or other stakeholders

PROJECT IMPLEMENTATION - Gender Equality in your project

Gender balance in decision-making processes

Gender dimension in research and innovation (R&I) content

Gender balance and equal opportunities in project teams at all levels

Examples:

- **Project management and décision** bodies having representatives women and men.

- **Project presentations** done by women and men

What does gender dimension in R&I mean?

Integrating the gender dimension in research content means taking into account the biological characteristics of both females and males (sex) and the evolving social and cultural features of women and men, girls and boys (gender).

Definitions	
Sex refers to biological characteristics of women and men, boys and girls, in terms of reproductive organs and functions based on chromosomal complement and physiology.	**Gender** refers to the social and cultural construction of women and men, of femininity and masculinity, which varies in time and place, and between cultures.

=> will be checked at the end of each reporting period

European Commission

PROJECT IMPLEMENTATION - EU Green priorities

SUSTAINABLE PROJECT MANAGEMENT

- Promote & Agree measures with consortium / staff for minimizing the environmental impact of your project

- Exchange good practices with other projects

TRAVELS AND MEETINGS

- Assess the need of travel and optimize / minimize impact (travel only if necessary, use sustainable means of transport, limit the number of travelers)

- Promote hybrid meetings / events (whenever feasible and valuable)

COMMUNICATION AND DISSEMINATION

- Promote online communication and dissemination tools

- Minimise the use of printed information materials

European Commission

REPORTING TO EU – best practices

- ✓ Ensure **quality control mechanisms** of deliverables and results

- ✓ Deliverables must be written as **self-explanatory documents** – read by external people

- ✓ Deliverables with **dissemination level "Public" = available for public in EU portal after approval:** include a good executive summary and a clear message. Consult in advance the target audiences about the conclusions of deliverables to make sure these are relevant for them. Make these deliverables attractive and use infographics/images

- ✓ Do **not overload the Periodic Report** with information from Deliverables or which is not specifically requested (e.g. such information can be included in Annexes)

- ✓ **Address the challenges** you phased and explain if/how these were solved (e.g. mention this in Periodic Report - section Deviations from Grant Agreement)

- ✓ **Provide the details** in the Financial Statements in order to link the costs with the work done (e.g. tasks, period, etc.)

European Commission

REPORTING TO EU – two specific modules in EU Portal

1. CONTINUOUS REPORTING

Open all along project implementation to upload information whenever needed:
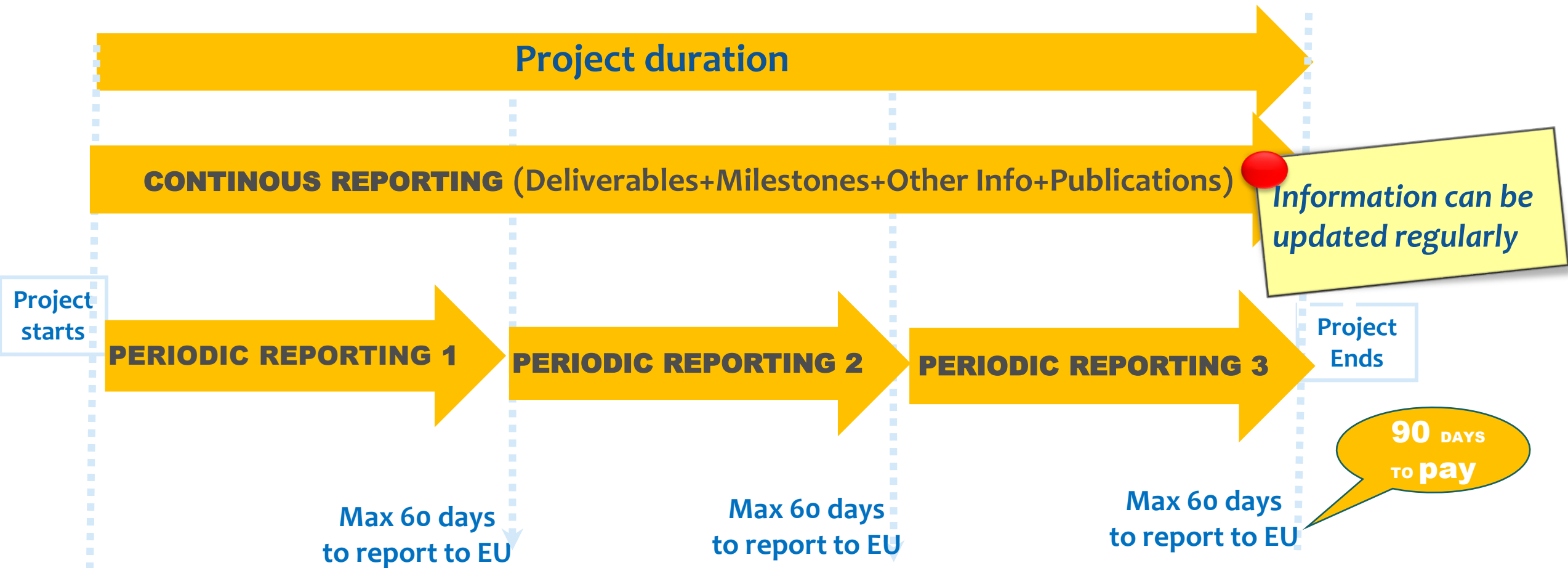- Specific information (e.g. Project summary, Publications, Critical Risks, Open Data etc.)
- Deliverables

2. PERIODIC REPORTING

Automatically open at the end of each reporting period:
- Reporting periods are defined in the Grant Agreement (e.g. 12 or 18 months)
- Online templates for Periodic Report are available in EU portal
- Periodic and Final Reports are the same, no additional task for reporting

European Commission

REPORTING TO EU – Continuous and Periodic Reporting

Project duration

CONTINOUS REPORTING (Deliverables+Milestones+Other Info+Publications)

Information can be updated regularly

Project starts

PERIODIC REPORTING 1

PERIODIC REPORTING 2

PERIODIC REPORTING 3

Project Ends

Max 60 days to report to EU

Max 60 days to report to EU

Max 60 days to report to EU

90 DAYS TO pay

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PERIODIC REPORTING – key aspects

WHEN ?

60 days
After end of reporting period

WHAT ?

Periodic Report
(technical & financial template document)

HOW ?

EU Portal ➔ Manage Project
(single package of Periodic Report)

PERIODIC REPORT:

1. **Technical report** (Part A - structured tables, Part B - free text)
• Activities and tasks implemented per Work Package
• Problems encountered (if any) and explanations / justifications for deviations from GA provisions
• Impact of the project (science, policy, society, economy, etc.)
• Annexes: e.g. project logo, diagrams, photographs and videos illustrating the work (if available)

2. **Financial report**
• Financial Statements of each beneficiary
• Explanation of Use of Resources and information on subcontracting, in kind contribution
• Summary of Financial Statements

Final Financial Report consolidates data from financial statements of all beneficiaries.
This report is used for the payment of the final balance for your project.

European Commission

PERIODIC REPORTING – tasks for consortium

ALL PARTNERS – provide information to Coordinator

Financial Statement: insert data
Technical Report: insert data

SIGN + SUBMIT
to Coordinator

COORDINATOR – prepares the reporting package

Financial Statements: check data
Technical Report: insert data

SIGN + SUBMIT
to REA

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REPORTING TO EU – coordinator's role in EU Portal

Project consortium:
to manage roles and access rights in the project

Manage project:
to access the grant management tool (GA documents, communication with PO, amendments, continuous reporting, etc.

PROJECT REVIEW – assessment of project progress (art. 25 of GA)

- ## Who?

REA Project Officer - responsible for the review

REA Financial Officer – assessment of financial aspects

Monitors - experts reviewers supporting REA officers

Project Consortium – represented by Coordinator and Work Package leaders

EC Policy Officers – EU staff involved in policy aspects

- ## When?

At the end of each reporting period, after submission of Periodic Report

This is an important step for Payment of the EU contribution

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PROJECT REVIEW – assessment of project progress (art. 25 of GA)

- ## What?

An opportunity for **exchanging information and getting feedback** from REA and EC policy DGs

Assessment of project progress based on the provisions of the Grant Agreement and on information from Continuous Reporting (Deliverables, Milestones, Publications, etc.) and Periodic Reporting (technical and financial information from Periodic Report), including web sources

The Project Review can include:

- a **Review Meeting:** online / in situ meeting organized by Consortium and REA Project Officer: presentations of work and results; discussions and clarifications; conclusions, next steps in implementation

- **a Project - Policy Session** with participation of EC Policy Officers (if applicable) – this can be part of the review meeting or scheduled in a different date

- **a Project Clustering Session -** several projects in the same thematic area presenting their results

PROJECT REVIEW – documents for project assessment

REVIEW REPORT

- ✓ Document **written by Monitors (experts**) based on the analysis of all available information (Periodic Report, deliverables, milestones, publications, presentations, web sources, etc.)

- ✓ Document **externalized to Consortium through EU Portal.** The Consortium has 30 days to sent comments to REA by using the EU Portal

PO ASSESSMENT REPORT

- ✓ Document **done by REA Project Officer** based on the Review Report and all other documents

- ✓ The document specifically **mentions the acceptance/rejection** of reports and costs and includes recommendations for the next implementation period / project finalization

- ✓ This document **closes the process of Reporting to EU** and triggers the Payment of EU contribution

European Commission

Support and Guidance in EU Portal

- **HORIZON EUROPE - Reference Documents in EU Portal**
    - All updates of documents are available in EU Portal
    - Check regularly these reference documents

- **HORIZON EUROPE - Model Grant Agreement (MGA)**

- **HORIZON EUROPE - Online Manual**
    - Online guidance for grant management
    - Updated regularly by EC services
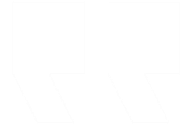
Thank you!

#HorizonEU @EUgreenresearch @REA_research

http://ec.europa.eu/horizon-europe