# Project deliverables and reviews

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3 May 2012

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# Reporting requirements

- **Periodic report** (within 60 days after end of each reporting period)
- **Final report** (within 60 days after end of project)
- **Report on the distribution of the Community financial contribution** (within 30 days after receipt of final payment)
- **Certificates on financial statements or on methodology** (if needed)
- **Deliverables** (as foreseen in Annex I)

# Layout and content

- **FP7 Guidance notes on project reporting**
  http://cordis.europa.eu/fp7/find-doc_en.html

# Periodic report

**Periodic report,** due 60 days after end of reporting period (incl. last reporting period), comprises :

- Self declaration by the coordinator

- Publishable summary

- Project objectives/work progress and achievements

- Deliverables and milestones tables

- Project management

- Explanation of the use of the resources

- Financial statements (Form C)

- Certificates on financial statements (CFS), if needed (>375.000€)

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# Final report

**Final report,** due 60 days after end of project (in addition to the periodic report for the last reporting period), comprises :

- Final publishable summary report
- Report on wider societal implications (incl. ethics, gender, awareness spreading) and
- Plan for the use and dissemination of foreground

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# Submission of periodic report

- Electronic submission

… accessible via the participant portal:
    http://ec.europa.eu/research/participants/portal/

Including a detailed user manual

- Signed originals by post for the Forms C and the CFS !

# Approval of reports and deliverables

- At end of each reporting period the REA has 105 days of their receipt to evaluate reports and deliverables and make the corresponding payment
    - No tacit approval of reports
    - REA may pay interest on late payment
- Payment is made after approval of reports and deliverables
- After reception of the reports the REA may:
    - ✓ Approve the reports and deliverables
    - ✓ Reject the reports and deliverables
    - ✓ Suspend the time limit for approval
    - ✓ Suspend the payment in whole or in part

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# Reporting recommendations

Guidance notes on project reporting
[ftp://ftp.cordis.europa.eu/pub/fp7/docs/project_reporting_en.pdf](ftp://ftp.cordis.europa.eu/pub/fp7/docs/project_reporting_en.pdf)

• Benchmark on the reporting guidelines.

For each WP: objectives/progress toward objectives/significant results/deviations if any with explanations/impact of these deviations and countermeasures/brief statement on the use of resources

• Reporting shall be done at the task level, and not at the level of the beneficiary (collaborative project).

• When a Deliverable is a prototype or a website, submit a report about the features of the prototype or website.

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# Reporting recommendations 1

- Insert a table listing the dissemination activities undergone (conference, publication, press release).

- Insert a table showing per beneficiary per WP the actual vs. planned effort for the period.

- Make a brief but proper conclusion for each Deliverable, putting into the higher context of the project.

- <u>Publishable</u> summary, benchmmark on the reporting guidelines: not a repetition of the abstract!

  project context and objectives/work performed and main results achieved so far/expected final results and potential impact and use/project public website

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# Reporting recommendations 2 - Resources

- **Personel costs:** State the category of personnel (manager/researcher/technician…). Per category state the number of people and PMs.

  e.g. 2 researchers 1.5PM; 1 technician 0.3 PM

- **Travel costs:** state the destination, date(s), number of attendees, purpose of the meeting/travel and whether a presentation was made, for each travel.

  e.g. Rome, 02/11/11, conference X, 1 person, 1 project presentation made.

  Helsinki, 15/05/11, WP2 meeting, 2 persons

- **Equipment:** statement that only depreciation was declared, and according to national accounting rules

- **Adjustment Forms C:** shall be explained in the Use of resources. If coming out of audit result, mention audit reference.

- **Receipt:** explanation shall be included

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# Project technical reviews

## General principles

✓ to assess the work carried out under the project over a certain period

✓ The REA may initiate a technical review at any time during and up to 5 years after the end of the project

✓ It may be assisted by external experts (reviewers) who give recommendations to the REA.

✓ The final decision is taken only by the REA. The consolidated experts' review report is in general communicated to the project.

## Not to be confused with project internal review !

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# Review objectives

- ✓ Degree of fulfilment of the project work plan
- ✓ Continued relevance of the objectives
- ✓ Resources planned and utilised in relation to the achieved progress
- ✓ Management procedures
- ✓ Beneficiaries' contributions and integration within the project
- ✓ Expected potential impact and plans for the use and dissemination of results

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# Review modalities

- The identity of the appointed experts is communicated to the project in advance

  ➡ Beneficiaries can object on a particular expert **only** on grounds of commercial confidentiality

- Reviews may be carried out remotely or involve sessions at the premises of the Commission or of the beneficiaries (e.g. in case of a demonstration)

- Guidance notes on project technical review:

  http://cordis.europa.eu/fp7/find-doc_en.html

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# **Review material**

- For all reviews:
  - ✓ Annex I (contractual Description of Work)
  - ✓ Periodic report for the period under review
  - ✓ Deliverables due in this period, according to the Annex I

- For a final review, the following additional documents:
  - ✓ The final publishable summary report
  - ✓ Report on wider societal implications (incl. ethics, gender, awareness spreading) as well as the plan for the use and dissemination of foreground

# **Review outcome**

✓ Accept or reject the deliverables

✓ Allow the project to continue without modification of Annex I or with minor modifications

✓ Consider that the project can only continue with major modifications

✓ Initiate the termination of the grant agreement or of the participation of any beneficiary

✓ Issue a recovery order regarding all or part of the payments already made and apply any applicable sanction.

# **Good practices**

- Only coordinators should contact project officer; Exceptions should be clearly justified

- Keep your project officer informed of progress, delays, problems

- Do not hesitate to ask questions

- Do not hide problems

- Do not overload your report with information not requested (if you want to provide additional information, put it in annex)

- Prepare carefully any review and/or audit

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Thank you for your attention

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