Guidance: Completing Project Reports

version 2 (November 2019)

Contents

0. Introduction

This document provides lead partners with guidance to complete **project reports**. Information on how to complete the **partner report** can be found in a separate document.[1]

- Project reports should always contain the maximum of costs certificates – avoid submitting reports with no cost certificates
- If you cannot make the reporting deadline, contact the JS in advance to agree on an extension

General principles

- o Try to make the report readable and avoid overly technical language.
- o Use all the different fields available.
- o Avoid just copying information from partner reports: as lead partner, you give a comprehensive report about the project progress as a whole.
- o Include sufficient detail: the report should be a self-sufficient document that allows an external reader to understand what you did.
- o Be specific: who (which partner), did what, when and where and with what result?
- o Carefully use the different drop-down lists in the report & double-check before submission.
- o Attachments: chose clear names for the uploaded attachments that be easily connected to work packages, activities or deliverables, e.g. AT1.2_Preliminary market research. Include a clear description in the description field. Max size 6 MB per attachment. The use of archive files like (.zip , .rar) is possible, but can only include .word, .pdf, excel, .jpeg.

Further information

For technical guidance on how to complete the partner and project reports, please refer to the documents on the landing page of the e-ms, https://ems.interregemr.eu/, "e-ms guide for filling in progress report".

1. Tab "Report"
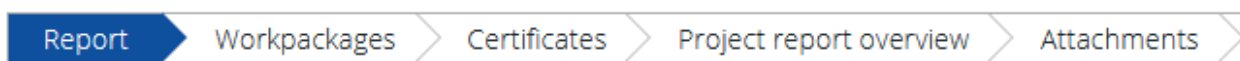
1.1. Section "Highlights of main achievements"

- - Provide a comprehensive summary **from the project start till the end date of the latest reporting period**. It is not just a summary of all that was done in the latest reporting period

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[1] Forthcoming. Expect for end of 2019.

- Make it reader-friendly and concise, avoid technical language: this section can also be used by the programme bodies to inform the general public or members of the Monitoring Committee
- Focus on the main activities carried out, the most important deliverables and outputs that the consortium has been working on and what has been done to achieve the planned results
- Highlight the progress on the work packages
- Avoid information on internal (management) or administrative issues and cross-references to other sections of the report

1.2.   Section "List of Partner FLC Certificates"

List Of Partner Flc Certificates

- Attach all available FLC certificates to the report

> Note: If for some partners FLC certificates become only available after you have already submitted the project report, please contact your project manager at the JS. You may be able to create an additional technical report where these certificates can be attached so that the payment for these certificates does not have to wait until the following report.

1.3.   Section "Project Specific Objectives"

Project Specific Objectives

- Select the level of achievement from the drop down list **(choose one status)**
- Provide a brief explanation on the status by the end of the reporting period
- Point out which specific tasks/activities carried out in the reporting period helped advance with meeting the planned objectives

1.4.   Section "Project Main Outputs Achievement"

Project Main Outputs Achievement

> *Automatically filled in based on the information you provide under the work package*

1.5.   Section "Target Groups Reached"

Target Groups Reached

- Always provide a sound methodology regarding the values set and report accordingly – if available, proof of the values reported can be added (e.g. website counting tool)
- Avoid double-counting when reporting
- **Pay attention to counting issues and definitions applied**:

> Example:
> A project has organized an event in period 1 and there have been 40 participants registered according to the list of attendance provided. These participants represent 3 universities (Maastricht, Hasselt & Liège) and 2 hospitals (Maastricht Hospital and Liège Hospital).
> The lead partner has indicated that as a result of the event, the following types of target groups

have been reached:
- Local public authority: 40
- Higher education and research group: 5

Comments:

The 40 participants do not represent 40 public authorities. The number of organizations represented should be counted and not the number of participants.

If the hospitals and the universities are counted together, the indicated value of 5 is OK.

If the lead partner wishes to keep the distinction between the two types of target groups, a revision is necessary, as represented below:
- Local public authority: 2 (Maastricht Hospital and Liège Hospital)
- Higher education and research group: 3 (Maastricht, Hasselt & Liège)

In Period 2 the same project organizes a different event and 20 participants attend. These participants represent 5 universities (Maastricht, Hasselt, Liège, KU Leuven & Eindhoven) and 3 hospitals (Maastricht Hospital, Liège Hospital, Aachen Hospital).

When reporting on the target groups reached in the 2nd reporting period, the values for the identified categories are the following:
- Local public authority:1 (Aachen Hospital) – the other 2 hospitals have been reported on before and they should not be counted each time they attend an event, so as to avoid double counting
- Higher education and research group: 2 (KU Leuven & Eindhoven universities) - the other 3 universities have been reported on before and they should not be counted each time they attend an event, so as to avoid double counting

At the end of the project, the project consortium has managed to reach the following target groups:
- Local public authority: 7
- Higher education and research group: 10

By applying the system indicated above, we make sure that the 7 local public authorities and the 10 higher education and research group indicated before are distinct entities and not the same ones counted for several times.

The values for the different target groups cumulate from one report to the other. That is why it is important to make the distinction between new categories and values reached each reporting period as well as to provide the evidence supporting the amounts indicated.

Filling in the description field about the target groups reached, also gives a more transparent and clear image of what is happening during each reporting period.

Target Groups	Target Value	Target Groups Reached Previous Periods	Target Groups Reached Current Report	Source Of Verification	Description Of Target Group	Target Groups Reached So Far Percentage
General public	1.000.000,00	0,00	0,00	🇩🇪 2000 Characters Remaining / 🇫🇷 2000 Characters Remaining / 🇬🇧 2000 Characters Remaining / 🇳🇱 2000 Characters Remaining	🇩🇪 2000 Characters Remaining / 🇫🇷 2000 Characters Remaining / 🇬🇧 2000 Characters Remaining / 🇳🇱 2000 Characters Remaining	0,00 %
higher education and research	5,00	0,00	5,00	🇩🇪 2000 Characters Remaining / 🇫🇷 2000 Characters Remaining / 🇬🇧 Output evidence and deliverables uploaded: ULiège + Centexbel + UMaastricht + KU Leuven + UHasselt — 1901 Characters Remaining / 🇳🇱 2000 Characters Remaining	🇩🇪 2000 Characters Remaining / 🇫🇷 2000 Characters Remaining / 🇬🇧 The University of Liege together with the MUMC+/azM organised the co-creation sessions, involving all of the project partners , the cross-border hospitals and external experts (doctors, nurses, physicians, IT specialist), on January 20 2017 & March 15 2017 in Maastricht + an online Delphi survey in order to identify the key parameters, characteristics and specifications of the future monitoring device. — 1595 Characters Remaining	100,00 %

1.6. Section "Problems And Solutions Found"

Problems And Solutions Found

- Report on any problems encountered during implementation, for example:
  o the unfolding of activities,
  o the elaboration of deliverables and outputs,
  o involvement of target groups,
  o partnership structure,
  o public procurement issues,
  o reporting on the target values of programme output indicators, etc.
- Indicate the solutions that you have found to tackle problems
- Be as specific as possible and indicate exact amounts, values, dates, etc. that have to be changed/ revised etc.
- Include work package specific problems directly under the tab "work packages"

Do not hesitate to report problems! It will not negatively influence the approval of your project report but helps the programme to provide assistance to projects.

Find below a list with a few schematic examples of problems, impact and solutions:

Table 1 Problems, impact & solutions

| Problem	Impact	Solution/Measure
Delay in receiving the grant letter	Late start of the project by 5 months and under-spending as compared to the forecast made in the application form	Extension of the project by 5 months allowing the partnership to carry out the tasks as initially planned and a redistribution of amounts between reporting periods
No interested service	No award of a contract and a	Prolongation of a certain

providers showed up for a procurement procedure carried out	delay of 2 months in implementing the project work as initially planned	activity and work package by 1 month, allowing a new procurement procedure to be carried out; **or** in-house preparation of the tasks with a budget shift of EUR 20,000 from external expertise to staff costs
Unrealistic target values set for the output indicators included in the approved application form	When reporting on the output indicators, there is no possibility to match the set targets	Need for a revision of the output indicators done in collaboration with the programme bodies
Partner dropping out of the consortium	Need for tasks to be reshuffled between the remaining partners	Request a project change allowing budget shifts between partners and re-allocation of tasks

1.7. Section Horizontal principles

Horizontal Principles

- Select a status from the drop down list
- Provide a brief description about which project activities/tasks contributed to reach that status

2. Tab "Workpackages"

Report Workpackages Certificates Project report overview Attachments
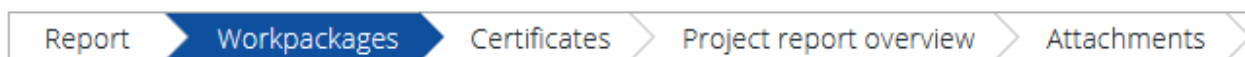
2.1. Drop-down field "work package status"
- Always select the current implementation status of each work package

Attention!
- Work packages "Management", "Communication" and "FLC" can never be "not started"
- You cannot claim costs for a work package that is listed as 'Not started' (see **Examples 1 & 2** below)

Figure 1 Example 1 - Negative:

Figure 2 Example 2 - Positive:

Wp Nr	Wp Title	Wp Start Month	Wp End Month	Wp Status	Wp Expenditure Current Report	Percentage Of WP reported so far
T1	WP3 - Business case and product feature analysis	Nov.2016	Oct.2019	behind schedule	€ 198.056,42	25,51 %

2.2. Section "*Please Describe The Progress In This Reporting Period And Explain How Were Partners Involved And Who Did What"*

- Include a short summary of the activities in the latest reporting period
- Highlight the role of the different partners and how partners cooperated.
  - E.g.: which reports were elaborated in draft/final version? Who was in charge of coordinating the work? Who acted as a contributor for the report? Who promoted the report and where?
- Ensure coherence between reported costs and activities. If you include costs for a meeting or specific services in the report, do not forget to describe this meeting or services in the report.
- Explain what the next planned steps are for the upcoming reporting periods (e.g. milestones ahead)

> - For work package "**Management**" a concise description of the meetings held and main events organized and decisions taken in regards to management are sufficient – no need to upload meeting minutes and other documents from all the internal meetings, COMAC meetings, etc.
>
> - For work package "**Communication**": in addition to reporting about planned acitivities, also include information on your communication successes – e.g. articles that were published about the project, videos, etc. Share with us how many people you reached and who reported about you! It is helpful to include links to online content (articles, websites); press clippings can be attached. For the first report (or if you have not reported on this so far), also include information on the compulsory publicity actions, i.e. the project poster and the project information on partner websites (see communication handbook).
>
> - For work package "**First level control**": here you can include information about the first level control process (e.g. delayed certificates)

2.3. Section "Please Describe And Justify Any Problems And Deviations Including Delays From The Work Plan Presented In The Application Form And The Solutions Found"

- Provide information on work package specific problems that you encountered, for example delays of activities and deliverables or if a different solution/ methodology has been chosen than what was listed in the approved application form

Example:

In the application form it is listed that a project will deliver 1 online survey for work package 3. In reality it is observed that the online survey is not sufficient to collect the volume of data needed. The budget available at work package level is sufficient to also perform expert interviews. Finally 1 online survey & 2 expert interviews were carried out.

Comments:

The explanations given should point out that the different methodology employed does not affect the final output listed in the application form, but it increases its quality. There are no budget deviations. The solution was discussed and agreed with all the project partners involved.

2.4.   Section "project main outputs"
- Always select the current status of each output from the available drop-down list
- Report all outputs that were finalised by the end of the reporting period
- Upload evidence of the finalised output
- Choose a title that matches the name of the output (O.T1.2 –xxxxx) and provide a short overview of the content in the appearing description field

Figure 3 Example 4 – Output attachments

Project Main Outputs	Project Main Output Description	Programme Output Indicator	Planned Delivery Month	Main Output Quantification Target	Achieved So Far(Not Including This Reporting Period)	Achieved In This Report	Level Of Achievement	Attachment
T1.1 Competitive initiatives identification		PSI10 Number of supported innovation-oriented cooperation projects between enterprises and knowledge institutes	Oct.2019	20,00		0,00	behind schedule ▾	
T1.2 Co-creation sessions		PSI10 Number of supported innovation-oriented cooperation projects between enterprises and knowledge institutes	Oct.2019	5,00		3,00	behind schedule ▾	**Attached File** **Final report on the co-creation sessions: It contains explanations on the used methodology, the different stakeholders and the final results.**

2.5.   Section "Please Describe Progress Achieved In This Reporting Period"
- Select from the drop-down list the status of each activity
- Select from the drop-down list the status of each deliverable
- Provide a brief description of the deliverable
- Upload a relevant attachment for it, when the deliverable has been finalized (use 'upload button')
    - o   If the deliverable constitutes a type of event organized – information about the list of attendance, presentations, photos, etc. should be included as a zip file
    - o   Choose a title that matches the name of the deliverable (e.g.D.T1.2 –xxxxx)

Figure 6 Example 5 – Deliverable attachments

Please Describe Progress Achieved In This Reporting Period

A.T3.1

Activity Title	Start Month	End Month	Act Status
Administrative and assembly support for consortia	04.2018	06.2020	proceeding according to work plan

D.T3.1.1

Deliverable Title	Deliverable Description	Planned Delivery Month	Del Status
Established collaborations	Out of the companies met, a fixed number will benefit from an opportunity for cross-border collaboration and, at the end, only a reduced number of them will participate in a cross-border research project.	06.2019	proceeding according to work plan

Deliverable Evidence
1 Uploads

Del Description

2000 Characters Remaining

see file "190531_RAP_All_CompanyReporting_BSB_till190228" in Project Main Outputs section

3.   Tab "Attachments"

Which attachments to attach here?

- Key project documents that are not already uploaded as 'deliverbales' or 'outputs'

- After the submission of the project report, no changes can be made to the attachments
- Attachments from previously submitted reports remain visible