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Start up phase Reporting

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Content of presentation:

- Start up phase
  - Adjustments
  - Setting up of project structures
- Reporting
  - Start Up Report (SUR)
  - Progress Report (PR)
Actual start of project implementation after fulfillment of the necessary requests for improvement and adjustments

Work plan and time table

- Necessary readjustments/improvements requested by the MC (i.e. conditions for approval)
- Time gap between project development and actual start of implementation → adaptations to the original work plan and time table as in submitted Application Form
- Definition of realistic project start date
- More detailed definition of work plan and time table

Project acronym - please check if there is a potential risk of infringement with existing trade mark rights
Start up phase is of specific importance

- Will influence and lay the basis for the whole implementation process
- Delays incurred in this phase may be difficult to be caught up later
Structures for implementing and steering the project

Management structure to be established (in line with the flowchart submitted together with the AF)

- General project and partnership coordination & decision-making: Project Steering Committee, ev. additional management bodies
  → Nomination of representatives of every project partner for the project management bodies

- Day-to-day management and coordination
  - Project Manager/Coordinator
  - Financial Manager
  - Communication Manager

- Thematic coordination (e.g. Group of WP Leaders)
Setting up project structures

Management structures

Setting down of **rules of procedure** for management bodies

- Intra body-level (e.g. decision making, communication)
- Inter-body level (e.g. exchange and communication between management bodies)

Staff selection and appointment of **management positions**

- Capacities and competences (according to different functions)
- If **outsourcing** of (management) tasks:
  - Tendering process (careful preparation and timing, provisions to be foreseen during the start up phase even without having these functions in place)
  - Respect of national and European legislation and Programme rules
Development of a „common working culture“

- Definition of core values for collaboration, feedback culture („soft measures“)
- Good working atmosphere as a basis for successful project implementation

Provisions for evaluation and project review

- Internal and/or external evaluation (timing, form, tools) should be defined between the project partners
- Partners should agree on how to integrate the evaluation results into the running project (e.g. feedback loops)
- Key indicators should be defined at an early stage
Basic principles - how to ensure effective reporting:

LP to take care of **smooth information flow** from the Programme to the partner level and vice versa

- To pass all information Programme reporting procedures/recommendations and reporting templates on to the partner level
- To organise that partners provide the right information in order to prepare the joint progress reports (internal reporting system, tools)
- To ensure that any feedback from the reports reaches the partners
REPORTING
Start-up Report (SUR)

Start-up Report (SUR)
→ Evidence on the actual start of the project
→ Updated information on some relevant contact details
→ Confirms the management arrangements
→ Evidence of the signature of the partnership agreement

- Personalized SUR template will be provided to every project
- SUR to be submitted within three months after the Subsidy contract has entered into force
REPORTING
Start Up Report - Structure

Information provided by the SUR

- **Contact details**
  - Lead Partner, Project Coordinator, Financial Manager and Communication Manager
  - Lead Partner’s and Project Partners’ First Level Controllers
  - Lead Partner’s bank account
  - Document storage

- **Management and partnership**
  - Signature of partnership agreement
  - Sub-contracting of project management (if applicable)
  - Composition of the Steering Committee, identifying the representatives of each Project Partner

- **Financial issues**
  - First level control
  - Partner budget breakdown

- **Ex-Ante preparatory activities for investments (if applicable)**
REPORTING
Reporting of project progress

- Lead Partner has to regularly report on the progress of the project

- Joint Progress reports (PR) to be prepared for each reporting period (6 months) - to be submitted to the JTS within 2 months after the end of each reporting period

- Specific (personalised) templates will be provided to the Lead Partner by the JTS

- Preparation Cost Report (PCR) to be submitted together with first Progress report