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Transnational Project Management and Monitoring

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Investing in Opportunities

What do we talk about?

- Transnational cooperation
- Roles and responsibilities
- Project management
- Reporting

Transnational cooperation

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You “drafted” it, now you have to implement it ☺

Transnational cooperation

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Which case is a good example for transnational cooperation?

1. Partner A works isolated from the others on its test facility.
2. Partner A asks partner B, who also installs a test facility, for advice on how to set it up.
3. Partner A and B jointly decide on a methodology how to install the testing facilities in their regions.

Transnational cooperation

4. Partner A and B and all the other partners define a joint methodology. Different but complementary tools will be tested in the pilot facilities that were decided by the partners. Joint evaluation will be done, on criteria that were agreed upon by everyone before the installation. The evaluation will feed back to the pilot facility that will then be improved accordingly. Partner A and B could not have achieved the same level of results if they had worked isolated by themselves.

Some tips

- ✓ You work as a team
- ✓ Clearly define roles and responsibilities of each partner
- ✓ Jointly decide on planning and milestones
- ✓ Take into account capacities / availabilities
- ✓ Remember your common objective **= project objective**

Roles and responsibilities

Roles and responsibilities

Lead partner (LP)

- EU regulation no. 1299/2013, Article 13
- **Main contact** with Joint Secretariat
- Subsidy contract
- Coordinates
- Submits reports
- Distributes ERDF to partners
- Monitors overall project progress / spending in line with application form → qualitative overview

Roles and responsibilities

All partners

- Signed partnership agreement
- Shared ownership + cooperation
- Report on your activities, deliverables, outputs, results, expenditure
- Communicate (externally and internally)
- Collect evidence
- Be on time

Roles and responsibilities

Joint Secretariat (JS)

Roles and responsibilities

Joint Secretariat (JS)

- 1 project = 1 project officer at the JS
- Main role – monitoring of your projects and triggering payment:
    - Review progress reports
    - Available for questions (via lead partner)
    - Attend partner meetings/project events
    - Quality appraisal of each project

Project management

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These might be your best friends…

But you need more than that…

Project management

Internal communication

- Decide jointly how you communicate, which tools, what type of info you exchange
- Meetings? Phone conferences? How often? Who?
- Write down your internal communication procedures, work flows, deadlines etc.

Project management

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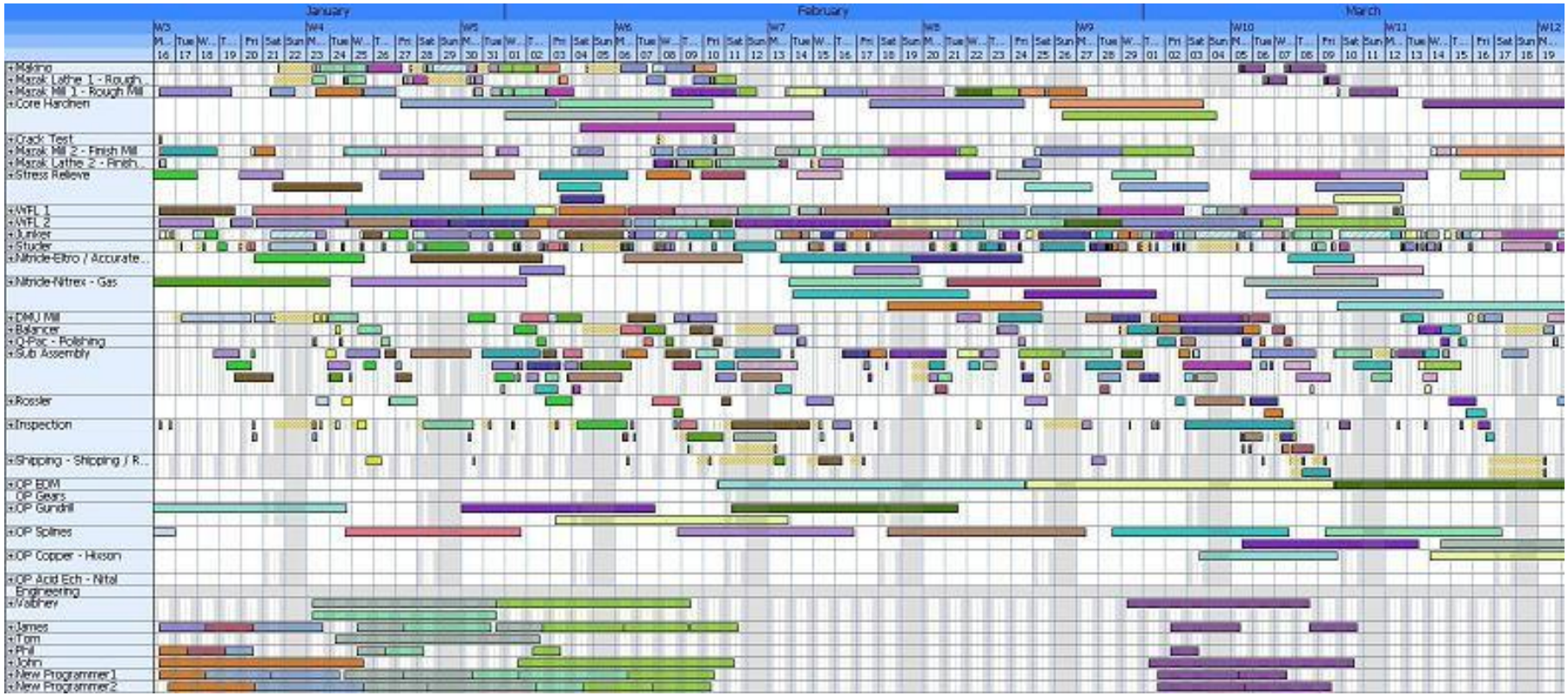

Project management

Challenges (or problems, issues, turbulences, difficulties, obstacles, barriers…)

- Be transparent if there is an issue
- Find solutions, be pro-active
- Discuss with partners and also with Joint Secretariat

Project management

Remember, you are in this boat together....
There might be other ways to move forward....

Project management

Changes

- Are possible and **will happen**
- Inform us as early as possible
- Formal modification request needed?
- Impact on timing, deliverables, outputs, results?
- Flexible: budget line modifications up to 20%

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Reporting

What will we cover?

- Purpose of reporting
- Reporting cycle
- First Level Control (FLC)
- Registering on the eMS
- Content of reports
- JS assessment

What is the purpose of reporting?

- Joint Secretariat (JS) to monitor project implementation (understanding progress on technical aspects and financial claims)
- Collect information on project contributions to Programme output indicators
- Information also contributes to the JS report to the Commission
- Capitalisation at the Programme level

Building blocks of a project report

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Overall project progress report

(to be written by Lead Partner (LP))

+

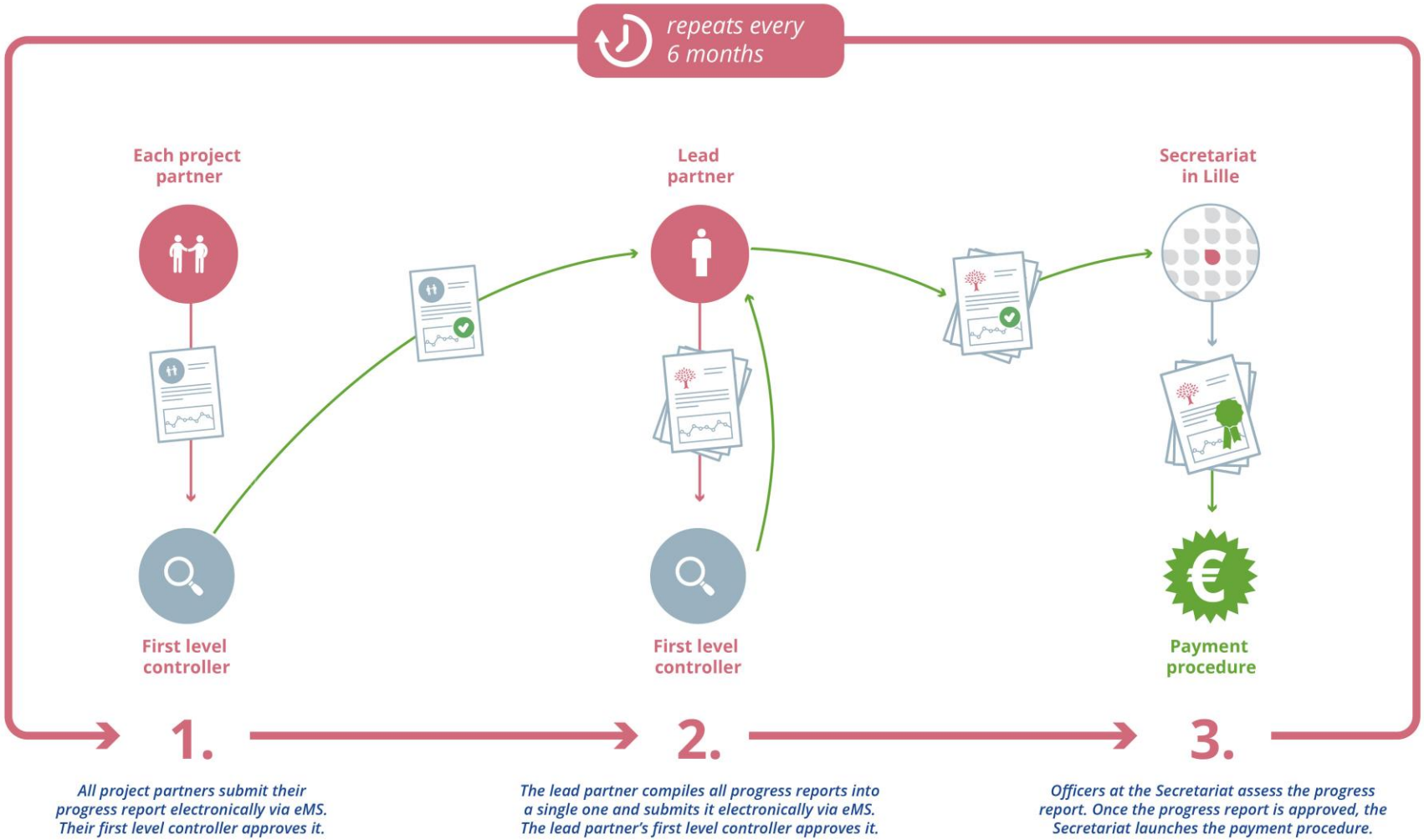
First Level Controller (FLC) approved certificates (reviewed by LP FLC and consolidated by the system)

What the JS reads to approve report and trigger payment

LP progress report + FLC certificate	PP2 progress report + FLC certificate	PP3 progress report + FLC certificate	PP4 progress report + FLC certificate	PP x etcetera

What the LP reads and draws from to write the overall progress report

Reporting cycle and information flow



First Level Control (FLC)

- The FLC checks that the expenditure incurred is compliant with the relevant EU, national, regional, institutional and Programme rules as well as with the provisions of the subsidy contract

First Level Control (FLC)

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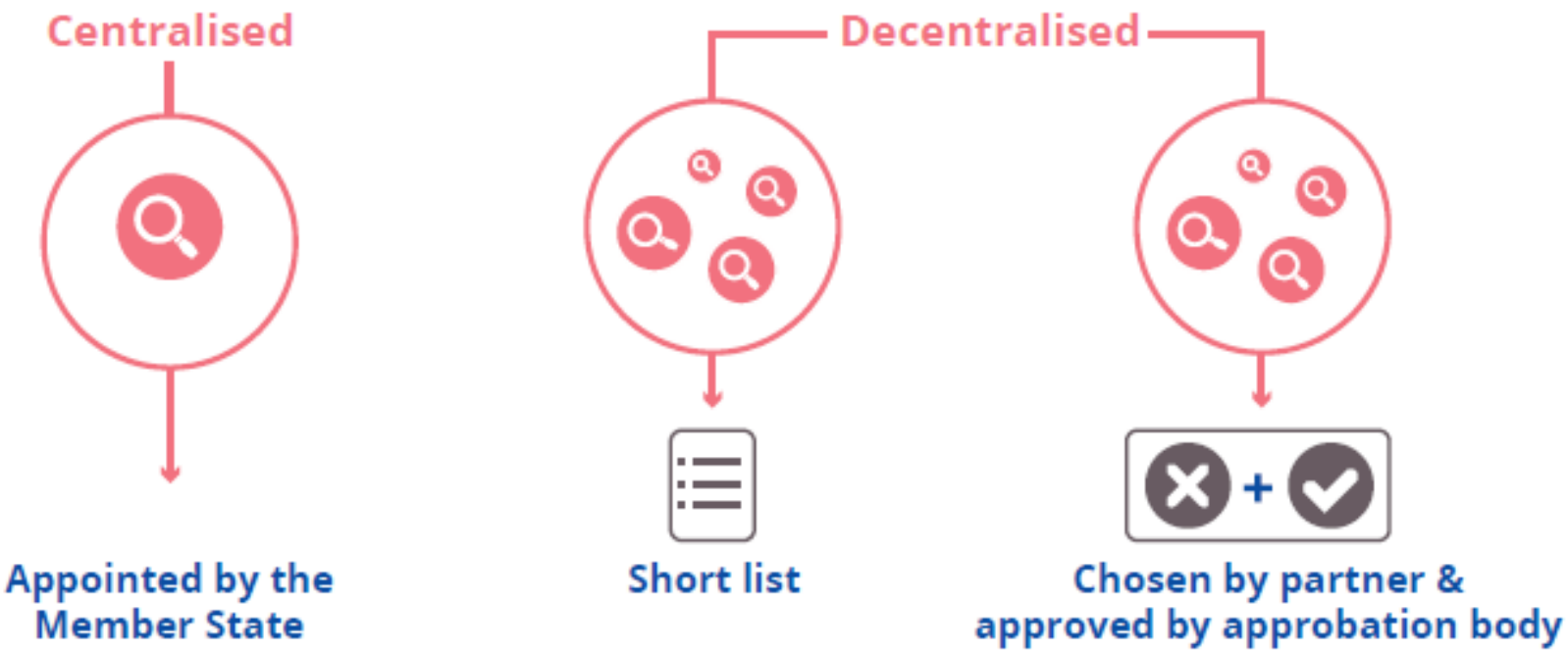
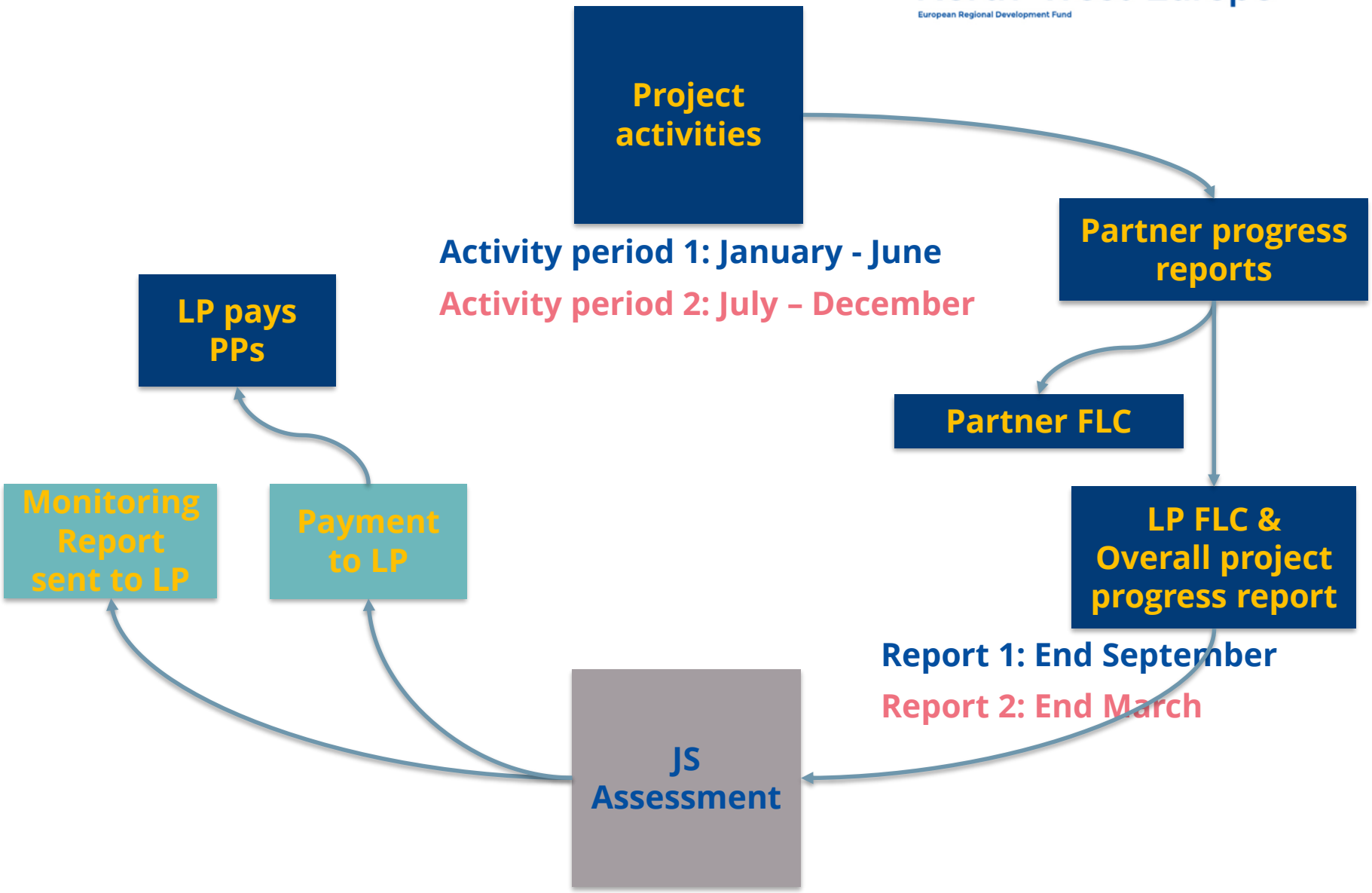
First level control systems:



Contact details of approbation bodies and centralised FLCs:
http://www.nweurope.eu/help-support/first-level-control/

Timings


Project activities
Activity period 1: January - June
Activity period 2: July – December
Partner progress reports
Partner FLC
LP FLC & Overall project progress report
Report 1: End September
Report 2: End March
JS Assessment
Payment to LP
LP pays PPs
Monitoring Report sent to LP

Your first reports

- Official start date of your projects: 29 May 2018 (MC 11)
- For Period 1: first report covers May-June + July-December 2018 period (2+6 months)
- This is to reduce the administrative burden of reporting a period which is only made up of 1.1 months
- So: at the **end of March 2019**, you have to submit your **Report 1.1** covering May-December 2018. After that, the 6-monthy cycle applies

Basic rules

- Projects must report **twice a year**
- All partners must fill in their **progress report and financial report**. If no costs, then financial report can be empty, but must submit progress report to LP explaining why.
- All partners must also submit information of **forecast** (estimated expenditure for next 6 months and description)

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Login

Registration

FAQ

EN

ems electronic monitoring system

developed by cpb software

INTERACT

Login

Username*

Password*

Login Register Forgot password

If you have any technical questions regarding the online application system or you encounter any difficulties entering or submitting your application, please send an email to **ems@nweurope.eu**.

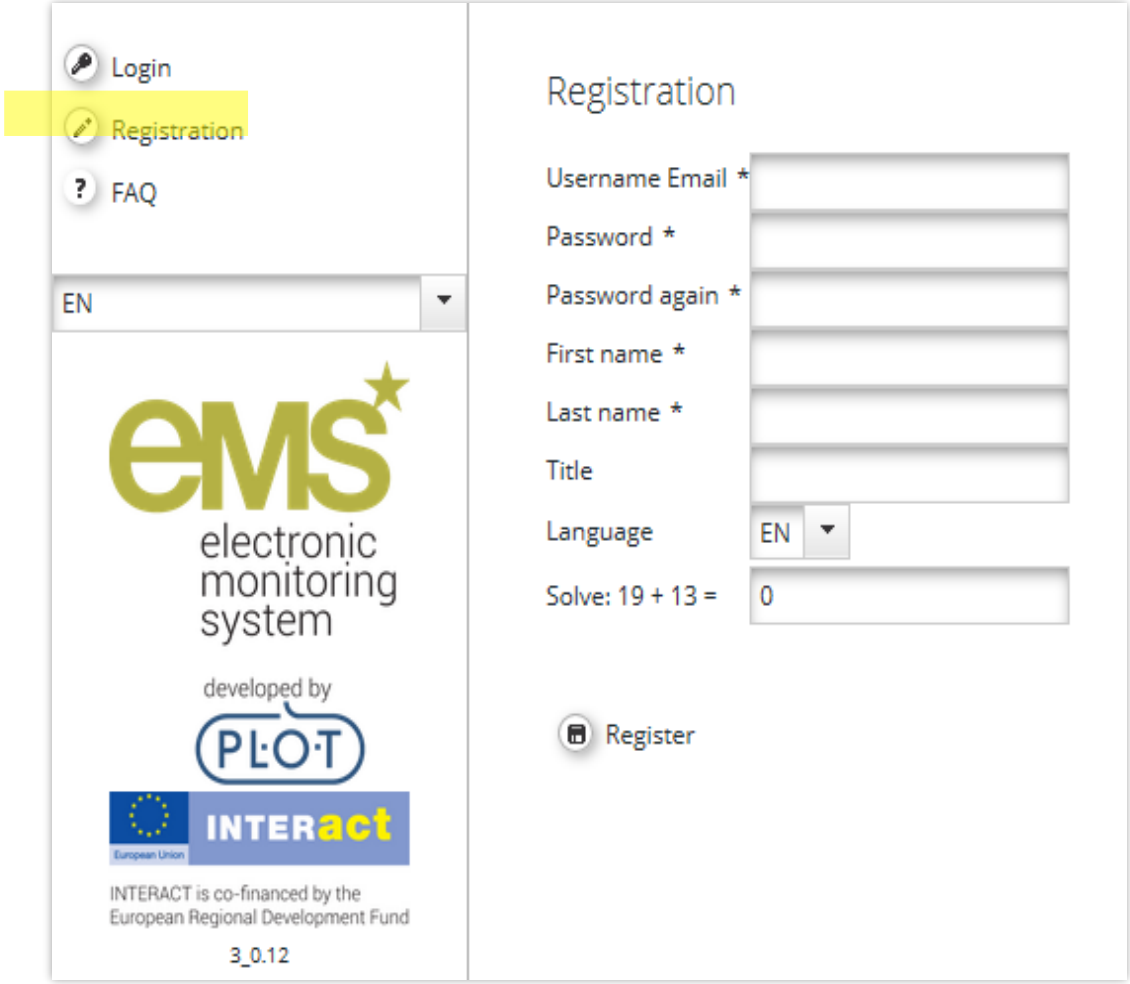
By loging into the system you agree to the following Terms and Condition:

- EMS_Terms_and_conditions.pdf

https://ems.nweurope.eu

Registration

- **All partners** are to register themselves
- Once accounts are activated (system to send an email) - **LP must assign the partners as users of the project**
- **FLCs** will receive the **access to the eMS** and your project either via the approbation bodies (decentralised countries) or via the JS (centralised countries)



Partner reports – Progress on activities

- Activities implemented in the reporting period
- It contains general descriptions and reporting per WP
- General descriptions: reporting on Outputs and upload of evidence of achieving the planned outputs
- Info per WP: description of activity contribution, problems encountered, mitigation measures, deliverable description with evidence in the form of links

Partner reports – Financial report (LoEs)

- Financial reporting is done through the List of Expenditures section (LoE)
- Every ‘expenditure’ to be associated to one budget line and one WP
- Spending forecast must be filled in on the eMS by each partner, even if no financial claim in current reporting period
- Partners must specify their ‘Partner Contribution’ (match-funding)

Project report

- Contains activity progress description and financial part of all partners - consolidated
- The activity progress description - to be written by the LP
- Financial part is compiled automatically by the system based on available FLC certificates of project partners

Submission

Save

Check saved Partner/Project report

Submit

Keep in mind

- Formatting
- Numbering
- Proof-reading
- Quality control

- Evidence must be relevant and structured
- Deliverables cannot replace descriptive part – they can support the description of activities

JS level assessment

- Maximum of 90 days from date of submission to assess and trigger payment procedure

- It leads to a **Monitoring report**
  - Quality appraisal at the JS level
  - Recommendations to projects
  - Overall project spending overview and forecast

Your project officer will email the **Monitoring report** to you. Please read it! Will improve your reporting and the times to process your future reports.

Q&A

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