

# Mid-term reporting and review

## MID-TERM REVIEW IN LUXEMBOURG January 30th-31st 2019

**Location:** DG Connect building EUROFORUM is: 10, rue Robert Stumper, L-2557 Luxembourg.

**Reviewers:** The Commission will be assisted by the following independent experts:

- Dr. Stefania Bocconi, National Research Council of Italy (CNR), Institute for Educational Technology (ITD)
- Dr. Georgios IOANNIDIS, IN2 search interfaces development Limited

[Review agenda + shared project team presentation](#)

[Review summary and notes](#)

[Official feedback from the project officer + reviewers - Interim report](#)

### Project team timetable during the review:

Tuesday January 29th	Wednesday January 30th	Thursday January 31st	Friday February 1st
Arrival to Luxembourg in the evening	Rehearsal day in EC building - final preparations	9-16 Mid-term review in the review location	Flight back to Finland

### Actions to be taken + Recommendations:

- [Project roadmap](#) (Del. 8) to be updated to wiki as a living document which should be updated throughout the rest of the project - **has been sent to project officer February 28th**
  - operative and realistic plan of activities for the remaining next 12 month
  - Measurements - KPI (Key Performance Indicators) for monitoring the project progress
  - Major problems expected
  - Detailed proposal for an amendment and internal reallocation of the budget
- Deliverable D14 - [Risk Management Plan](#). D14 should be resubmitted and include a contingency plan to mitigate the delays in WP3 and reach the stated project objectives. - **has been sent to project officer March 14th**
- Holistic plan ([Modified project plan](#)) for the rest of the project to be submitted by the end of February to project officer - plan for changes with the budget (subcontracting etc.) - **has been sent to project officer February 28th**
  - Prototypes: additional document in M 18, functionalities in beta versio for May and for September, e.g., what are the criteria for selection, specification, functionalities (EDUFI)
  - WP3 resources and the prototype development
  - Internal re-allocations of resources between different WP's if needed (each partner should check the current situation)
  - WP4 Deployment and evaluation
    - Pay attention that specific objectives 3 and 4 (Annex I) are reached - clear planning, activities, steps, commitment
    - How to organize and document the deployment (Finland + Netherlands + Germany)
    - Opportunities for going beyond the partner countries (countries close to Finnish infrastructures: Sweden, Norway, Denmark as an example)?
    - Case study Compleap-Europass and possibilities for collaboration (to be reported as apart of WP4 - Clear indication digital environment can be linked and feed to compleap. This would be a great results for the project, feed into sustainability and impact. Realised with a workshop with Europass system interface and data form Europass feed into Compleap and vica versa. Could create impact on European level.
- Re-submit deliverables below by the **March 14th** - new section: New feedback after M12) - **has been sent to project officer March 14th**
  - Del. 35 [Stakeholder management plan](#) (DUO)
  - Del. 18 [User scenarios](#) (EDUFI)
  - Del. 15 [Desk research](#) (EDUFI)
- Additional documents concerning the development of the beta prototype (WP3) - **draft versions to be sent to steering committee by May 13th - final steering committee approval on May 23rd - by M18 (End of May)** - to be reviewed M19 (remote review)
  - (Developing and releasing the initial version of the Beta prototype (Beta part 1) by Month 18 and the full Beta version (Beta part 2) by Month 22);

- Detailing the criteria adopted for selecting key functionalities to be developed in the Beta version;
- Developing a detailed plan for the piloting of the Beta prototype (WP3);
- Developing a detailed deployment plan of the Beta prototype (WP4).

- "Living documents" – reference to the Grant Agreement – Description of the Action, table 2) Deliverables, page 23: Deliverables with an open "Delivery date", for example: M6-M18:, the draft deliverable should be uploaded on the Eduuni workspace and updated regularly. Submission to the EC in the last due month.

## OFFICIAL AMENDMENT PROCEDURE

Requested documents:

- A cover letter from the Project Manager explaining and justifying the request. (draft)
- A formal amendment request letter signed by the Coordinator authorised representative (model attached). (draft)
- An updated Annex I. Please use track changes. (draft)
- An updated Annex III. (draft)

## Official feedback from the project officer + reviewers - Interim report

### Final documents

- [Specific Periodic Report 1 \(pdf\)](#) - signed and submitted on 17.1.2019
- Financial reports:
  - [CSC](#)
  - [OPH / EDUFI](#)
  - [OY / UOULU](#)
  - [Gradia / JEC](#)
  - [DUO](#)
  - [All partners summary](#)

## Instructions to steering committee for approval of the review documents (comments by email by Monday 14th January at 12 o'clock)

Please read through the mid-term reporting document drafts (all documents gathered in the table below)

Compare documents to what is written in a [Grant Agreement Annex I](#) (Compleap project plan)

Share comments and ideas for any updates via email to the rest of the steering group and Antti by Monday 14th January at 12 o'clock. Please note that proofreading and styles are still missing.

Updated documents will be sent by CSC to project officer in the European Commission by January 17th - two weeks before the review as requested. Project officer will deliver all material to the reviewers so project team/coordinator will send material only to project officer. In addition to these reports, the public materials on compleap.eu and this Eduuni working area and wiki are available to the reviewers.

## Instructions to project team on mid-term review (collected by Monday 7.1. on this page)

Each WP leader should take part this meeting and prepare to present what has been done in the project so far (shared presentation by January 30th - won't be sent to reviewers beforehand)

Project team will prepare agenda for the review (based on the mid-term reports)

Review is based on the periodic (technical) mid-term report + financial statements + deliverable reports that have been sent to the project officer during the first project year.

## MID-TERM REPORTING

Mid-term reporting includes two kinds of reports:

- financial statement, which is a summary of financial side of the project during the first year (each partner delivers)
- periodic (technical) report, which is a summary of progress and concrete actions made during the first project year (each partner contributes - one shared document)

These documents should be delivered to project officer 60 days after the end of Month 12 (November 2018) - please see further instructions and timetable below.

Project coordinator will inform the Consortium of this reporting and gather all the information

- each partner must deliver updated financial statement template as instructed
- The coordinator will sum up the technical report after getting needed information from the wp leaders

## TIMETABLE AND DOCUMENTS

What?	When?	Status (color coded)
Financial report templates (each partner) updated and sent to coordinator <ul style="list-style-type: none"> <li>▪ <a href="#">CSC</a></li> <li>▪ <a href="#">OPH / EDUFI</a></li> <li>▪ <a href="#">OY / UOULU</a></li> <li>▪ <a href="#">Gradia / JEC</a></li> <li>▪ <a href="#">DUO</a></li> <li>▪ <a href="#">All partners summary</a></li> </ul>	by 20th of December	All partners have sent the financial figures - Minna Hahl will make summary of these figure during the first week of January
Periodic (technical) report updated by WP leaders	by January 7th	
Coordinator produces financial summary of the financial reports	1st week of January	
All material in Eduuni wiki - informing steering committee to be approved	8th of January	
Approval (by e-mail) and informing about any needed updates	by 14th January at 12 o'clock	
Final updates by coordinator	January 14th- January 17th	
Reporting documents (financial + technical) to be sent to project officer (PO will forward material to the reviewers after that)	January 17th	

## INSTRUCTIONS FOR FINANCIAL REPORT ([instruction document](#) + [appendix](#))

COMPLEAP's second (and final) reporting period has ended at the end of November 2019. We have to report our costs and PM's for the last period **1<sup>st</sup> December 2018 – 30<sup>th</sup> November, 2019.**

### 1. Annex VI - Financial Statement

Please fill the attached Financial Statement (first page, CSC will fill the summary). Following cells should be filled:

- Beneficiary Legal Name
- Beneficiary Short Name
- Beneficiary Nb (1.CSC, 2.EDUFI, 3.UOulu, 4. JEC, 5.DUO)

#### 1. 1. Declaration of eligible costs (in €) column "This period"

- Personnel costs (no need to detail per WPs) Please see the attachment "Appendix specific conditions for direct personnel cost."
- Subcontracting

- Other specific direct costs (travel costs and other costs)
- Use "**Adjustments**" column if you need to make changes for the first period costs

**1. 2. Declaration of receipts**

- Choose Yes or No

**1. 3. Certificate on the financial statements**

- Choose Yes or No (only EDUFI has to submit the certificate on the financial statements, others can choose No)

Remember to date and sign the form. This form should be signed by the person authorized to sign this kind of documents according to your organization (e. g. Financial Director).

Please send the Financial Statement in PDF-format to [antti.laitinen@csc.fi](mailto:antti.laitinen@csc.fi) and [minna.hahl@csc.fi](mailto:minna.hahl@csc.fi) and send **also** the original document with a signature to CSC - IT Center for Science Ltd.

Minna Hahl

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Finland

or

CSC – Tieteen tietotekniikan keskus Oy

Minna Hahl

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**All the material should be sent no later than 2nd of January, 2020**

- Financial Statement in PDF-format by email
- Original Financial Statement by mail or by courier