



Acronym: SmartBEAT  
Name: Smart system for the management of  
Heart Failure in older adults  
Call: AAL JP Call 2014  
Contract nr: aal-2014-157  
Start date: 01 May 2015  
Duration: 36 months

## D1.1 Project management plan

Nature<sup>1</sup>: P

Dissemination level<sup>2</sup>: CO

Due date: Month 1

Date of delivery: Month 1

Partners involved (leader in bold): **FhP**

Authors: ..... (FhP)

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<sup>1</sup> L = Legal agreement, O = Other, P = Plan, PR = Prototype, R = Report, U = User scenario

<sup>2</sup> PU = Public, PP = Restricted to other programme participants (including the Commission Services), RE = Restricted to a group specified by the consortium (including the Commission Services), CO = Confidential, only for members of the consortium (including the Commission Services)



## Partner list

Nr.	Partner name	Short name	Org. type	Country
1	Fraunhofer AICOS ( <i>coordinator</i> )	FhP	R&D	Portugal
2	Centro Hospitalar São João	CHSJ	End-U	Portugal
3	Verhaert New Products & Services NV	VPS	SME	Belgium
4	Remedus	REM	SME	Belgium
5	Seniornett Norge	SN	End-U	Norway
6	LifeonKey	LoK	SME	Israel
7	VigiSense S.A.	VIGS	SME	Switzerland
8	KempenLIFE	KLF	End-U	The Netherlands
9	Stichting Smart Homes	SmH	R&D	The Netherlands
10	Faculdade de Medicina Universidade do Porto	FMUP	R&D	Portugal

## Revision history

Rev.	Date	Partner	Description	Name
1	18.06.2015	FhP	Created the first version	Joana Lobo
2	14.07.2015	FhP	Added main content	Joana Lobo
3	17.08.2015	FhP	General review	Liliana Ferreira

<b>Approved by (Partner)</b>
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## Glossary

**GA:** General assembly

**HF:** Heart failure

**KPI:** Key performance indicators



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(FhP, monthly) .....**Error! Bookmark not defined.**
- 4.5. Final report .....**Error! Bookmark not defined.**



# 1. Introduction

This document is part of *Task 1.1: Project coordination* within *Work package 1: Project management*. The lead partner of this work package and this task is Fraunhofer AICOS (FhP). The document describes the project management structures and procedures to be followed within the SmartBEAT project and it is meant to be, together with the *Project quality plan*, a tool at the service of all partners to assist them during the project.

When necessary on the course of the project, the document will be updated.

## 1.1. The partnership

SmartBEAT is funded under the AAL JP Call for proposals in 2014, aiming at the development and testing of ICT-based solutions in real life situations which enable and support sustainable care models for older adults, as well as focusing on addressing essential or critical needs in society and industry.

The SmartBEAT consortium consists of 10 partners:

**Table 0** SmartBEAT partner list

Nr.	Partner name	Short name	Country
1	Fraunhofer AICOS ( <i>coordinator</i> )	FhP	Portugal
2	Centro Hospitalar São João	CHSJ	Portugal
3	Verhaert New Products & Services NV	VPS	Belgium
4	Remedus	REM	Belgium
5	Seniornett Norge	SN	Norway
6	LifeonKey	LoK	Israel
7	VigiSense S.A.	VIGS	Switzerland
8	KempenLIFE	KLF	The Netherlands
9	Stichting Smart Homes	SmH	The Netherlands
10	Faculdade de Medicina Universidade do Porto	FMUP	Portugal

## 1.2. Project goals

The main goal of the SmartBEAT project is to address the needs of senior Heart Failure (HF) patients and their formal and informal caregivers by offering an integrated solution to leverage patient self-care through autonomous condition monitoring and real-time feedback to their carers. With the proposed solution, it will be possible to improve disease outcomes and enhance



the quality of life of senior Heart Failure patients. This will be achieved through a smartphone based HF telemonitoring kit, which uses communication technologies and sensing devices to remotely monitor several clinical variables of HF patients considered essential by expert cardiologists. In summary, SmartBEAT has 4 operative objectives:

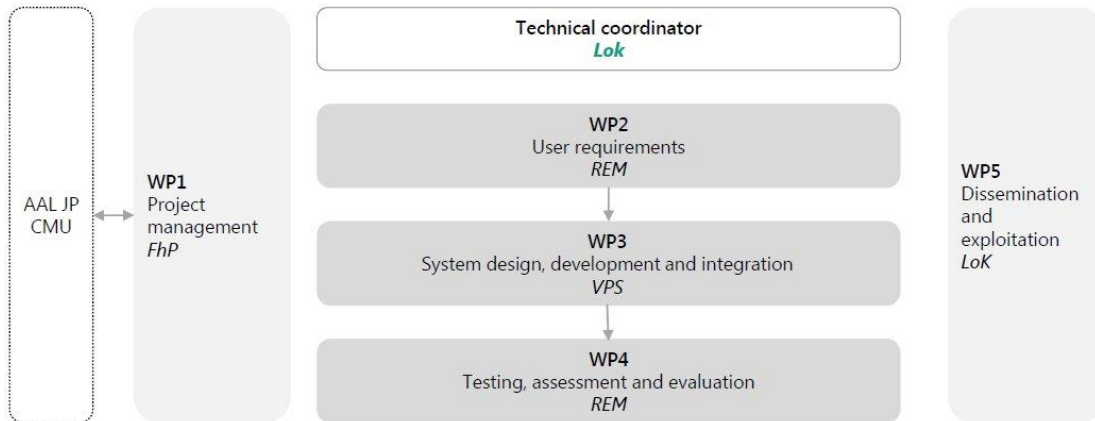
- Implement and deploy an innovative, user centred, integrated mobile solution to leverage patient self-care;
- Support the users through a monitoring device which will gather information on the patient physiological parameters (heart rate and rhythm, body weight, crackles and blood pressure) and physical activity;
- Develop the support application responsible for the communication between the patients and their carers;
- Develop innovative system intelligence component capable of an overall approach where patients and caregivers can define their interests and receive valuable information from several information resources.

We should reach the market up until 2 to 3 years after project completion, i.e. Apr 2021.

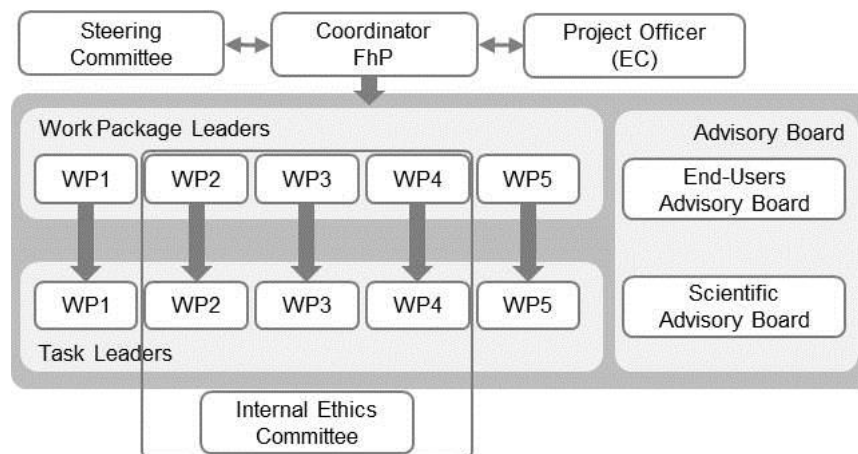
Project goals include producing a fully functional prototype along with a roadmap to reach the market. This will be the exploitation plan.

## 2. Project management structure

Please refer to the Consortium Agreement for further details. The project is organized as depicted in Figure 1.



**Figure 1** SmartBEAT structure



**Figure 2** SmartBEAT management structure

For proper management and advice, the project will include committees and an advisory board as described in Figure 2 and further detailed in section 2.1.

### 2.1. Staff involved

Members of the team play specific roles to assist project activities and project management. There are partners who assume specific roles and, within these, a specific person may be assigned the leadership in that role.

- Project Coordinator (FhP) – Project manager: Liliana Ferreira
- Technical Coordinator (LoK) – Technical manager: Linda Harnevo



- Dissemination and exploitation Coordinator (LoK) – Dissemination manager: Linda Harnevo
- Steering Committee: chaired by the Project Manager and consisting of 1 (one) representative per partner. The Steering Committee provides strategic guidelines to the Coordinator and steers the project according to the objectives agreed upon.
- Technical Committee: chaired by the Technical Coordinator and composed of the partners involved in the technical work package (WP3), i.e. FhP, LoK, VPS, VIGS, REM, and SmH. The committee also provides guidance and advice about scientific matters, either of procedures or reporting.
- Dissemination and Exploitation Committee: chaired by the Dissemination and exploitation Coordinator and composed of one representative of each partner in the consortium.
- General Assembly (GA) – brings together the Steering Committee, i.e. one representative of each partner, chaired by the Project Coordinator. The General Assembly is the high level management body of the SmartBEAT project. It is the highest authority in the project, standing above the Technical Committee and the Dissemination and Exploitation Committee.
- End-users advisory board – advocates for users' points of view and interests
- Scientific advisory board - provides feedback and recommendations to the operational management
- Ethics Committee – helps to ensure the project's full adherence to ethical values.

### 2.1.1. Technical Committee participants

- Led by LoK – Linda Harnevo
- FhP – Filipe Sousa
- VPS – Bert Verbruggen
- VIGS – Bruno Beauvais
- REM - Peter van Vooren
- SmH – Ad van Berlo

### 2.1.2. Exploitation and Dissemination Committee participants

- Led by LoK – Linda Harnevo
- REM – Peter van Vooren
- VIGS – Serge Grisard
- FhP – Liliana Ferreira



- KLF – Ad van Berlo
- SmH – Ad van Berlo
- VPS - Bert Verbruggen

### 2.1.3. End-users advisory board

- CHSJ – José Silva-Cardoso
- SeniorNett – Helge Klitzing
- KempenLIFE – Ad van Berlo

### 2.1.4. End-users advisory board

- FMUP - José Silva-Cardoso
- FhP – Liliana Ferreira
- SmH – Ad van Berlo

### 2.1.5. Work Package leaders

- WP1: Project management – Liliana Ferreira (FhP)
- WP2: User requirements – Peter van Vooren (REM)
- WP3: System design, development and implementation – Bert Verbruggen (VPS)
- WP4: Testing, assessment and evaluation – Peter van Vooren (REM)
- WP5: Dissemination and exploitation – Linda Harnevo (LoK)

## 2.2. Responsibilities

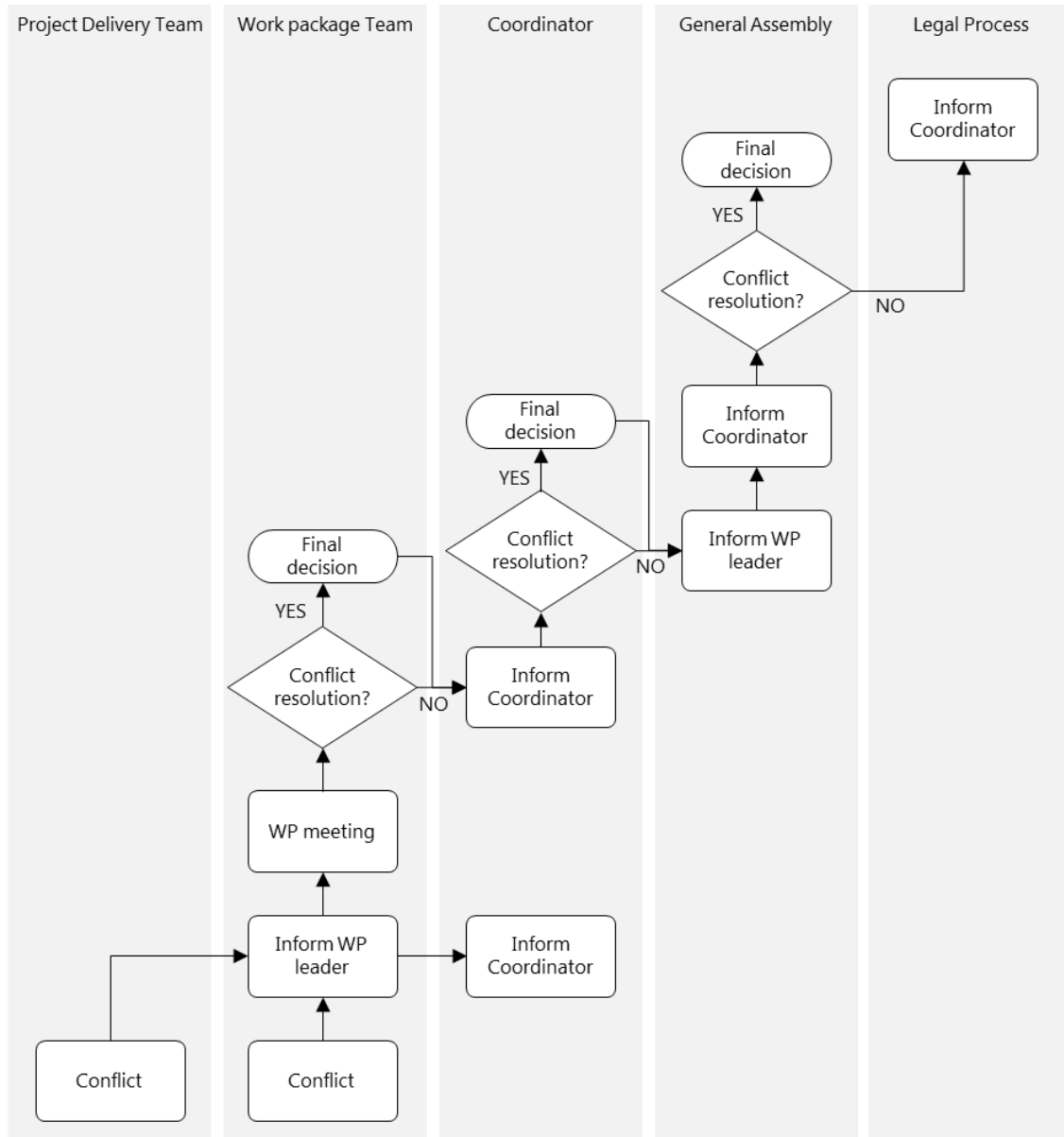
Each partner shall use reasonable endeavour to supply the Project Coordinator and the Work Package leaders the information, documents and other input that is required to deliver the project to the agreed upon timescales, within cost and quality level.

Each partner will insure to:

- Promptly notify all the partners in the same Work Package and the Project Coordinator about any significant problem or delay in performance;
- Inform all partners in the same Work Package and the Project Coordinator of relevant communications it receives from third parties in relation to the Work Package and/or the Project;
- Verify the accuracy of any information or materials it supplies and promptly correct any error therein of which it is notified. The recipient Party shall be entirely responsible for the use to which it puts such information and materials.

## 2.3. Project conflict resolution

Project conflicts shall be resolved at the lowest operational level possible in order to facilitate timely solutions. If the internal process fails, the matter be escalated to formal Arbitration as detailed in Figure 3.



**Figure 3** SmartBEAT conflict resolution process



### 3. Project monitoring

#### 3.1. Project meetings

Please refer to Consortium Agreement for more details about meeting arrangements and voting rules.

In order to secure proper coordination among partners and timely delivery of results, the following project meetings shall take place in the course of the project:

- 1 (one) general conference call each month.
- 1 (one) technical meeting at least every 2 weeks (~ 2 per month). Initially these meetings will happen on Tuesday's mornings.
- 1 (one) General Assembly meeting every 6 (six) months:
  - Each WP leader should prepare a presentation and provide a report about the WP status and progress (please refer to *Periodic Report Template*, section 4);
  - The Coordinator will present and provide a report about project performance according to the KPIs defined in Table 1;
  - The Coordinator will present and provide a report about the risk level according to the eventual risks detected and respective contingency plans summarized in section 3.3;
  - Each partner will inform the General Assembly about project events, press releases, publications, patents, demonstrations, etc. (please refer to *Impact and Awareness Activities Template*, section 4.1.8).
  - Each partner will provide information about finance and effort (please refer to *Financial Report Template*, section 4.1.9);

Additional meetings may be scheduled as needed, such as to cope with times when quick progress must be made.

#### 3.2. Project performance monitoring

Before each General Assembly meeting, the Project Manager, supported by the Technical Coordinator, will provide the KPI table through which to measure the performance of the project and its execution from different perspectives.

**Table 1** Key performance indicators

Cat	Performance	Indicator	Approximate target value (to	Period of assessment	Responsible
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			be defined during project)		
KPI	Goals achievement	% progress of each specific result vs goals	100%	At each individual deadline. Reported in each 6 month report.	FhP
KPI	Achievement of initial requirements	% achievement of initial requirements	100%	Permanently. Reported in each 6 month report.	FhP
KPI	Partner involvement	% reports delivered on time, % meetings attended, no. inputs brought/work plan	100%	Permanently. Reported in each 6 month report.	FhP
KPI	Delivery of deliverables and reports	% reports delivered on time No. days delay	100% 0%	At each individual deadline. Reported in each 6 month report	FhP
KPI	Quality of reports delivered	% reports passed full quality check; % reports requested for resubmission by EC	100% 0%	At each individual deadline. Reported in each 6 month report	FhP
KPI	Use of the resources	% of deviation from original efforts assignment	0%	At each individual deadline. Reported in each 6 month report	FhP
KPI	Effective risk management	No. risks mitigated	Based on milestones and risks	At each individual deadline. Reported in each 6 month report	FhP

### 3.3. Risk management

The role of risk management activities in the project will be to identify risks timely, assess their consequences (occurrence, impact on cost, results, time, most affected WPs and partners, among others), and develop suitable responses based on corrective courses of action or contingency plans. Risk tracking will thus be made through the different meetings in order to minimize their impact to the widest extent possible. At this stage, we have identified a list of possible risks which are described in Table 2. Such risk log will be updated, whenever relevant, throughout the course of the project.





**Table 2** Management related risks

Risk no.	WP/Task	Potential risk	Risk level	Impact	Actions
R01	WP1 to WP5	Failure of a partner to complete tasks	Low	Medium to high	Project Management reallocates effort to other(s) partner(s) in the WP.
R02	WP1 to WP5	Discrepancies between the plan and reality.	Low	Medium to High	Internal periodical meetings, progress reports, and the internal communication, will let the coordinator know the state of the project and apply the corrective measures, if needed, in order to assure the success and timely delivery of the work according to the work plan.
R03	WP1 to WP5	A partner leaves the project	Low	Severe	Even though each partner has a specific role in project in accordance to its expertise, the first measure will be to attempt, if possible, to reallocate effort within the consortium. If this is not possible, a new partner should be found according to the rules of the AAL JP.
R04	WP1	Unexpected delays in project management	Low	Severe	WP leaders must periodically prepare reports to be submitted to the General Assembly.
R05	WP1 to WP5	Delay in task completion	Medium	Medium	Tools (as described in this document) will be used by the Project Manager and the Technical Leader to detect risks of delay and to make a strict follow up. When delays are due to technical issues, extra effort could be reallocated to the delayed WP.
R06	WP1 to WP5	Lack of communication within the consortium - clear goals	Low	Severe	Project Manager will use and foster the use of communication tools and will take concrete actions to solve eventual communication issues and to reinforce the communication.
R07	WP1 to WP5	Discrepancies between partners or about the assigned work	Low	Medium to High	Work assignment and related questions will be decided in internal meetings. If there is any discrepancy between two or more partners, these will be discussed in the internal meetings, and the final decision belongs to the project coordinator.
R08	Task 5.3	Disagreement on ownership rules	Medium	High	The Consortium Agreement sets the first base for ownership rules, which will be detailed from month 12 onwards, and final rules and agreements will be signed during the last 6 months of the project.



R09	WP4	Pilot sites need more time for validation	Medium	High	These will be handled through: a) contingency plans, b) activity rescheduling, c) increased efforts of involved parties.
R10	WP3	Time needed for the development of the system is inadequate	Low	High	The project will enter the development phase after running an extensive a) technology assessment, b) overall design and subsystems design, c) architecture detailed definition.



**Table 3** Technical risks

Risk no.	WP/T ask	Potential risk	Risk level	Impact	Mitigation Plan	Contingency Plan
R11	WP3 and WP4	Synchronization problems between the system at home and the gateway.	Low	High	Find the origin of the problem and fix it, possibly using different synchronization techniques.	There will be the need to think about different communication technologies.
R12	WP4	Failure in adapting the existing service in the different countries.	Low	Medium	Readjust the suitability of functionalities to be implemented in each trial.	WP4 will set up the pilots and their implementation. During its first task, related parameters, e.g. functionalities, configurations for each trial, services availability, and local available services will be taken into account.
R13	WP4	Needs change from one pilot to the next	Medium	Medium	WP4 will detail the configuration for each trial and adaptations for each site. A forecast of the environment characteristics, materials and equipment needed for the optimal performance of the trial for each location will be considered. Best devices election and deployment should be studied for each pilot for optimum performance.	
R14	WP4	Technical problems with the coverage of the devices using wireless technologies	Low	High	WP4 will cover the characteristics of the trial sites. These will alert partners to possible problems that can occur at	



					those sites, usually related to the coverage of wireless devices due to the characteristics of the place (e.g. thick walls reducing coverage) and rectify them by the use of repeaters, alternative connection methods, etc.	
R15	WP3 and WP4	Testing new technology systems with older adult users can imply a negative attitude towards technology if they have never experienced it	Medium	Medium	The system will be as simple, intuitive and user friendly as possible. One of the most important inputs to consider will be seniors' opinion and involvement from onset. Personal training on the system will assure its acceptance and use at least for the trial period. The easy control of the system through an intuitive touch screen will contribute to minimize this risk.	Improve the system based on users' expectations.
R16	WP3 and WP4	Data and communication are not secure enough	High	High	Find the unsecured spots and apply extra security measures and/or cryptographic mechanisms.	Ask for consultation from online security and data privacy experts, and apply the advised methodology.
R17	WP4	The developed solution does not match the users' expectations and needs (features and usability)	Low	Medium	Involving end-users from onset until project end will be the key to get as much feedback as possible and constantly improve and refine the system functionalities. The knowledge and experience of the	Continuous evaluation end feedback will be covered from WP2 to WP4 to reveal any problems that users may encounter so that those problems can be fixed. Refinements will be made in order to better match users' expectations.



					partners will be used during the validation phases to avoid any conflict between reality and end-users' expectations.	
R18	WP64 and WP5	The participation of the users is low	Low	Medium	Devoted dissemination campaigns and publicity will be carried out, prior to the validation phase, to ensure a wide participation.	Experts and peers will be involved to motivate the participants.
R19	WP3 and WP4	Malfunction of hardware components	Low	High	Find the origin of the problem and try to solve locally with manufacturer.	The Consortium will replace these components with others from the extended inventory list already produced during the analysis of the state-of-the-art.
R20	WP3 and WP4	Unexpected obsolescence of system components	Low	Medium	The project will place increased importance to modularity and interoperability. The aim will be to use more than one standard, protocol, or technology for all of its provided functionality, so as not to rely on only one particular technology or supplier.	Obsolete system component will be replaced.
R21	WP3 and WP4	Adoption difficulties and incompatibility issues	Low	Medium to High	New standards or techniques may be difficult to integrate or interoperate between them. The issue will be addressed during the course of the project, by having the Technical Leader and technical partners aware of standards.	Relevant forums and standardization bodies will be consulted by some partners of the project, which will inform the consortium properly.



R22	WP4	Criteria to measure the results and user satisfaction are not suitable	Low	Medium	This can be avoided by using suitable existing models for evaluation of the user satisfaction.	Look for validated scales in other fields that could be used for this purpose. In alternative, set up an evaluation method based on knowledge gathered in WP2.
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**Table 4** Market and impact risks

Risk no.	WP/ Task	Potential risk	Risk level	Impact	Actions
R23	WP3 to WP6	The product has poor performance	Medium	High	Performance indicators will be monitored and contingency plans will be set up to correct performance deviations.
R24	WP5	Lack of good positioning in the market	Low	High	WP5 aims to analyse all the relevant characteristics related to the potential market, and the position of the system will be defined accordingly. Previsions on market size and other aspects like competitor studies will be performed. Target market and best marketing strategies will be defined. As a flexible solution, market potential seems to be good, so this risk will be minimized.
R25	WP5	Price difference amongst countries due to different legislations and other factors	Low	Medium	The consortium comprises the required specialists to perform these tasks. WP5 carries out an Intermediate and Final Business Plan elaboration.
R26	WP4	Wrong selection of users, insufficient number of them or low acceptance	Low	High	User and technical partners have been chosen according to their position in the market. Different user profiles to which the system could be interesting will be taken into account.
R27	WP4	Identify only a small or limited group of suitable subjects to use the system	Low	High	During the proposal, organizations are supposed to develop the business cases suitable for each one of them.
R28	WP5	Different conjunctures among countries	Low	Medium	WP5 will take care of the development of a business plan taking into account all the received feedback from the validations, assuring in that way the suitability of a business plan for each country, and this is why it will be prepared towards the end of the

					project.
R29	WP5	The cost of platform deployment can reveal itself to be too high for the market users	Medium	High	While the consortium will try to solve this by providing using devices already available at the users daily life (as smartphone and user's existing home sensors as the home scale), the rent and economic capabilities amongst different users can be an important point to consider.
R30	WP5	Wrong estimations of financing requirements for the service launching	Low	Medium	The evolution of the whole project will give the consortium partners enough perspective to foresee a proper deployment plan for the European market.

### 3.4. Pilot application

For the project to be successful and the SmartBEAT solution to be accepted by the intended target audience, users' points of view will be taken from onset and the project will strive to achieve the latest recommendations on user involvement in designing, developing and testing the solution across several iterations. The project will take advantage of its special conditions, i.e. having **three** partners, in **three/four** different countries, who accumulate roles beyond that of end-users. This provides a unique opportunity to design and develop a solution that truly meets end-users' needs and expectations.

The activities planned ahead for user involvement are summarized in Table 5.

**Table 5** Activities involving end-users

Activities	Portugal	Norway	The Netherlands/Belgium
<b>Economic impact &amp; users' expectations</b>	Collection of 30 questionnaires	Collection of 30 questionnaires	Collection of 30 questionnaires
<b>Offered services definition</b>	5 users involved in services definition	-	5 users involved in services definition
<b>User interface design and testing (UIs)</b>	10 users involved in interfaces definition	-	10 users involved in interfaces definition
<b>SmartBEAT TOPharness and mobile app design and testing</b>	5 users involved in design and usability	-	5 users involved in design and usability



<b>Field trial with the integrated system</b>	10 people using the system	10 people supporting the use of the system	10 people using the system
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## 4. Documentation required

### 4.1. Periodic/progress report

A periodic or progress report shall be completed every 6 (six) months. Its contents are to be presented by each WP leader during the General Assembly meetings. The Project Coordinator, FhP, will provide the Partners with the necessary templates to fill in.

In summary, progress reports should be done every 6 months:

- Before each GA meeting
- Reporting just the previous 6 months
- By Work Package
- Presenting main results, main difficulties
- Presenting dissemination activities
- Presenting a financial report (effort: costs and HRs)

#### 4.1.1. Pending issues

Should there be pending issues waiting to be solved, it is up to the WP leaders to present a list of these issues to the General Assembly.

#### 4.1.2. Deliverables: submitted and on-going

Each WP should list the deliverables submitted during the 6 (six) months prior to the General Assembly meeting along with a list of Deliverables underway at the time of the meeting.

If any registered or expected delay on Deliverables submission is to be communicated, along with an explanation, at the General Assembly meeting by the WP leader. If falling beyond the date of the General Assembly meeting, the expected date for Deliverables submission should also be communicated at the same time.

#### 4.1.3. Milestones achieved

The Project Manager, with the support from the Technical Leader, will provide a list of Milestones achieved during the report period. Any registered or expected delays should be accompanied by an explanation.

#### 4.1.4. Scientific and/or technical progress

According to the AAL Association template, WP leaders should fill in a table such as the one shown below.



<p>Please check appropriate box:          The project <input type="checkbox"/> is in line with (or) <input type="checkbox"/> deviates from the valid description of work (version/date: )          In the case of deviation, please explain how and why:          &lt;...&gt;</p>
<p>Provide a summary of developments since the last report:  <u>A. Performance of the project consortium</u>          &lt;...&gt;  <u>B. Technical achievements</u>          &lt;...&gt;  <u>C. End-user services</u>          &lt;...&gt;</p>
<p>How many consortium meetings were held during the period covered by this report?</p>
<p>&lt;...&gt;</p>

#### 4.1.5. Work in progress

Work in progress refers to Tasks and Deliverables. For each Task or Deliverable in progress at the time of the report, the WP should fill in the details: task/deliverable number, responsible partner, partners involved, status, scheduled date of completion, estimated date of completion, and additional comments if needed.

#### 4.1.6. Next steps

This section refers to the next steps for the 6 (six) months following the period mirrored in the report. Each WP leader should list the Tasks and Deliverables for this next period, filling in the same fields as the ones used for the Work in Progress (see section 4.1.5).

#### 4.1.7. Risk management

Finally, in order to do a thorough risk management, WP leaders will be asked to summarise risks identified during the reporting period and how these were dealt with, according to the table below.

**Table 6** Template of risk management table

WP	Risks of the period	Occurrence	Mitigation/contingency plan implemented	Result	Responsible



#### 4.1.8. Report of impact and awareness activities

Every 6 (six) months, the partners should incorporate on the progress report the impact activities of the project (e.g. project event, press releases, publications, patents, demonstrators, etc.). This should be presented to all the partners during General Assembly meetings.

Project participant responsible (indicate country)	Activity	Date	Medium and reference (press, event, newsletter, webpage, etc.)	Indicative coverage
<...>	<...>	DD/MM/YYYY	<...>	<...>

#### 4.1.9. Financial report

Every 6 (six) months, the partners should incorporate on the progress report a section about the financial execution of the project. This should be presented to all the partners during General Assembly meetings.

##### a. Financial report template

The financial report template should be filled in by each partner. The Project Coordinator will then combine all the information from the different partners.

Partner org. acronym	Actual cost of the project for the reporting period	Planned cost of the project for the reporting period	Actual effort in person/months for the reporting period	Planned effort in person/months for the reporting period	Remarks
	€	€	PM	PM	
TOTAL	€	€	PM	PM	

PROJECT PAYMENTS DURING THE REPORTING PERIOD					
Partner Organisation Acronym	Funding requested (if applicable)	Date of request sending (if applicable)	Date of receiving the money	Time between request and receive (if applicable)	Remarks
1	€	DD/MM/YYYY	DD/MM/YYYY		
TOTAL	€	-----	-----	-----	-----

If applicable, please differentiate between EC and national grant payments (additional line for partner).



ADDITIONAL INFORMATION
<p><u>Please check appropriate box:</u></p> <p>The financial progress of the project <input type="checkbox"/> is in line with (or) <input type="checkbox"/> deviates from the partner's Grant Agreements &amp; Work Packages plans (personal efforts, other costs, etc.)? In case of deviation, please explain how and why: &lt;...&gt;</p>
<p>Have you encountered or do you foreseen any financial difficulties for the project realisation (e.g. payments, additional costs, other)? &lt;...&gt;</p>
<p>If yes, please explain. &lt;...&gt;</p>
<p>Do you want to make any other comments in relation to the financial aspects of the project? &lt;...&gt;</p>
<p>If yes, please explain. &lt;...&gt;</p>

## 4.2. Interim report

This report is to be used to assess project progress, risks and allow forecasts. It will compile information from the project first half. It will contain: progress of the work, financial interim statement, and project assessment.

## 4.3. National reports

This is a report of the sole responsibility of each individual partner and refers to the documents asked by each NCP in accordance with the respective National Grant Agreement.

## 4.4. Mid-term review

The mid-term reviews are mandatory for all the projects in the AAL JP. The review serves three main purposes: 1) to evaluate performance and the status of the project against the plan, 2) to provide an opportunity for project partners and AAL JP representatives to share experiences for further programme development, and 3) to provide an opportunity for the consortium to get feedback and fresh perspectives about the project along with new possibilities.

The mid-term reviews shall be scheduled for shortly after the end of the mid-term in the project. They shall be organised between the project coordinator, the CMU and the 'lead NCP'.

In specific cases, a final project review may also take place.

The reviews are non-public events. Two independent expert reviewers will eventually be contracted to assist in the review process. The review meetings are physical and typically last 4



hours. It is desirable for the project to be represented as broadly as possible, with a minimum of 1 (one) representative of each partner profile (R&D, Industry, End-user).

Below is the tentative schedule for the project reviews.

<b>Table 7 - Tentative schedule of project reviews</b>			
<b>Review no.</b>	Tentative timing, i.e. after month X = end of a reporting period	Planned venue of review	Comments, if any
<b>1</b>	After project month: 18	To be decided	Mandatory
<b>2</b>	Not later than project month: 36	To be decided	If required by the AAL JP CMU

There is a template for the mid-term review report, which will be made available by the Coordinator to all partners in due time.

#### 4.4.1. Documents to submit prior to the review meeting

At least two weeks prior to the review meeting, the following documents should be submitted by the project:

- Updated agenda of the meeting
- Questionnaire about timing, consortium, etc.
- A publishable 1-2 page summary in a format that may eventually be used for the AAL yearly brochure. Permission to publish the summary or extracts from it should be made available.
- Other relevant material in electronic format, e.g. DoW, annual reports, deliverables, brochures, links to videos, etc.

One week ahead of the review meeting, an attendee list of consortium participants should also be available.

#### 4.4.2. Materials to deliver during the review meeting

The project should deliver presentations on:

- Project structure, resources and management issues
- Project content issues—IT and technology perspectives, end-user perspectives, service- and business perspectives—that would enable the reviewer to do an assessment as required on the review form.

A printed copy of the presentation should be provided to the review team.



## 4.5. Closure phase

Within two months (60 calendar days) after the end of the project a Final Report will be submitted electronically to the CMU and the NCP of the coordinator, i.e. 'lead NCP'.

The template for this report made available by the Coordinator to all partners in due time.

## 4.6. Report preparation and submission procedures

For each report, with the exception of National reports (see section **Error! Reference source not found.**) the project coordinator will send requests and/or reminders to the project partners, namely to WP leaders. Each partner will be asked to be responsible for and prepare their own reports (e.g. financial, effort, impact, activities). The coordinator will compile all the reports from the partners and submit the final version to the CMU.

Apart from the reports listed above, each NFA may require specific scientific and/or financial reports.