

QUALITY OF LIFE AND MANAGEMENT OF LIVING RESOURCES

Key actions 1, 3, 4 and 5

Guidelines for the preparation of periodic and final reports of concerted actions and thematic networks

The purpose of this note is to assist contractors participating in QoL concerted actions or thematic networks to compile and format periodic and final reports for submission to the Commission according to the terms and conditions specified in the contract. It should be noted that depending on the project's specific objectives, the final output may vary considerably, ranging from the production of a technical book, proceedings of workshops or conferences, periodic newsletters, up to networks of researchers, etc. It is therefore difficult to draft output specific guidelines for progress and final reports since they all depend on the kind of deliverables to be produced. Nevertheless, this note is a generic attempt to specify the minimum reporting standards required irrespective of goals and specific objectives. As such, it is meant to present in as clear and concise manner as possible, all details concerning report submission without replacing or altering the contract's legal and financial conditions.

The text is also available on CORDIS "Quality of Life" webpage at the following address: <http://www.cordis.lu/life/src/projmgmt.htm>

Reports

According to article 4 (Annex II) of the contract, the following reports should be submitted to the Commission containing all necessary information for a comprehensive and detailed assessment of the progress achieved over the reporting period:

1. **Periodic progress reports** detailing on the progress, resources devoted to the action or network, any deviations from the work plan and deliverables already produced. The information provided should enable the Commission to adequately evaluate the overall progress as well as each participant's contribution towards the project's objectives over the specified period.

Periodic progress reports are submitted to the Commission within two months of the end of the relevant reporting period as indicated clearly in the contract.

2. A **final report** presenting the objectives, work, results and conclusions drawn by the project, according to the technical annex.

Final reports are submitted to the Commission within two months of the end of the duration of the project.

3. **Cost statements.** Please refer to annex II of the contract.

It is emphasized that the authorization of payments by the Commission services depends on the content of the above mentioned reports as well as on their timely submission together with the corresponding cost statements.

Periodic Progress Reports

As already mentioned, periodic progress reports should be submitted to the Commission within 2 months of the end of the reporting period (article 4) and without prior request on behalf of the Commission. A periodic progress report consists of the following documents submitted in paper copy (1 copy) and in digital format (e-mail, diskette, or CD-ROM):

1. A 2- to 3- page **summary**, briefly describing the project's overall progress and being suitable for publication. It is normally prepared by the coordinator. It should describe in a clear manner the objectives and up-to-date progress identifying both benefits and beneficiaries (target audience) of the expected results. The format of this document should follow closely that provided as annex I of this document. The abstract should be delivered to the Commission both in a hardcopy and digital format.
2. A **progress report** detailing on the progress achieved so far by the project following closely the workplan as presented in the technical annex. This document is prepared by the coordinator and, where appropriate, it is based upon each participant's individual contribution. The progress report should enable the Commission services or authorized representatives to thoroughly review and evaluate the project's progress. Therefore, it should present, in a concise and comprehensive manner, all activities, meetings, actions etc. undertaken during the reporting period together with the deliverables achieved so far. All deliverables such as books, technical documents, proceedings, minutes of meetings etc. should be annexed to the report.

Annex II provides a detailed example of the format to be followed in preparing this report.

3. Where appropriate, brief **individual progress reports** prepared by group leaders describing their contribution towards the project's objectives.

Final Report

The project's final report should be prepared as a self-contained scientific/technical document presenting the objectives, work and results achieved during its lifetime. A draft version is to be submitted to the Commission within two months of the project's termination date. The final version, incorporating comments and suggestions from the Commission services and/or its authorized representatives should be submitted in two bound copies. More specifically, the final report is a synthesis of the following documents:

1. **A project summary (suitable for publication) in hardcopy and digital format**
2. **Final report**

Its format should be similar to that of periodic progress reports. In addition, the report should clearly indicate in what ways the project has contributed successfully to the coordination of scientific research efforts and activities in the respective domain of interest. All project deliverables should be annexed to the report.

- Annexes:
- I. Example of project progress summary
 - II. Example of progress report format

Annex I: Project Progress Summary

Project Progress Summary

Section 1: PROJECT IDENTIFICATION Information to be provided for project identification	NOT CONFIDENTIAL
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Title of the project		
Acronym of the project		
Type of contract		Total project cost (in euro) €
Contract number	Duration (in months) Months	EU contribution (in euro) €
Commencement date		Period covered by the progress report (e.g. 1 February 2000 – 31 January 2001)
<u>PROJECT COORDINATOR</u>		
Name	Title	Address
Telephone	Telefax	E-mail address
Key words (5 maximum - Please include specific keywords that best describe the project.). , , , ,		
World wide web address (the project's www address)		
List of participants Provide all partners' details including their legal status in the contract i.e.,contractor, assistant contractor, subcontractor, etc. (which contractor?).		

Annex I: Project Progress Summary

Section 2: Project Progress Report

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(2 pages maximum.. Use short sentences. Be factual. Avoid technical terms as much as possible)

Objectives:

Results and Milestones:

Benefits and Beneficiaries:

Future Actions (if applicable):

Annex II: Consolidated progress report

Progress Report

Title of the project		
Acronym of the project		
Type of contract		Total project cost (in euro) €
Contract number	Duration (in months) Months	EU contribution (in euro) €
Commencement date		Period covered by the progress report (e.g. 1 February 2000 – 31 January 2001)
<u>PROJECT COORDINATOR</u>		
Name	Title	Address
Telephone	Telefax	E-mail address
Key words (5 maximum - Please include specific keywords that best describe the project.). , , , ,		
World wide web address (the project's www address)		
List of participants Provide all partners' details including their legal status in the contract i.e.,contractor, assistant contractor (to which contractor?).		

CONSOLIDATED PROGRESS REPORT

Objectives

The project's overall and specific objectives are listed.

Description of work

A detailed description of the work which, in conformity with the technical annex, was carried out during the reporting period. Difficulties in carrying out specific tasks and sub-tasks or deviations from the technical annex should be clearly indicated together with the reasons for such developments.

Results and deliverables

An overview of the results and deliverables produced during the reporting period in conformity with the technical annex, their scientific significance, a description of the benefits and beneficiaries and an overview of possible recent developments, which may affect the project's scope and justification. Special emphasis is placed on exhaustive submission of deliverables such as books, publications, proceedings, minutes of meetings, workshops, conferences etc.

Dissemination of research results

A brief description of all dissemination activities carried out within the action's context such as publications, meetings, WWW homepages, extension services, networking. Supporting documentation of all activities should accompany this document as an annex.

Future actions

A look ahead to the next reporting period. An assessment of actions foreseen in the workplan and of their feasibility particularly in light of difficulties experienced so far.

Action requested from the Commission

If the Commission is requested to take action in order to resolve a certain problem, please provide all relevant information and the nature of the action requested.

Note: *All project deliverables (proceedings, publications, minutes of meetings, ...) should accompany the report as annexes.*