



Kick-off meeting

24-25 May 2022

WP6
MANAGEMENT, COORDINATION AND
QUALITY ASSURANCE
Inés Rey - FICYT



SERVICIO DE SALUD
DEL PRINCIPADO DE ASTURIAS



GOBIERNO DEL
PRINCIPADO DE ASTURIAS
CONSEJERÍA DE SALUD



FICYT

The project: "Improving Digital Empowerment for Active Healthy Living" (IDEAHL) has received funding by the Horizon Europe Framework Programme under GA 101057477



Funded by
the European Union

DESCRIPTION

- Foundation for the promotion of the Applied Scientific Research and Technology in Asturias
- Established since 1984
- Board: Regional Government
University of Oviedo
Healthcare Service of Asturias

FICYT

LOCATION





Population:
Spain: 47,2 M
Asturias: 1 M
Oviedo: 0,22 M

Area:
Spain: 504.645 Km²
Asturias: 10.603 Km²
Oviedo: 186 Km²

- Management of the Regional R&D Funding Programme since 1984
- Management of the Office of European Projects

OFFICE OF EUROPEAN PROJECTS

- Support to companies and research centers to increase their participation in European funding programmes
- Scientific dissemination
- Support Office to improve the access of companies to international markets
- Unit specialised in Health: collaboration agreement with the Regional Ministry of Health to manage European projects granted to research groups of the Health System of Asturias
- Large experience in European projects: 10 projects as coordinators
25 projects as partners

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

OBJECTIVES:

- To manage the project and ensure results are reached
- To guarantee a continuous exchange of information among partners and with the EC
- To organize the consortium meetings

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

TASKS

- Task 6.1.- Coordination, reporting and data management
- Task 6.2.- Kick-off and other periodic meetings
- Task 6.3.- Internal evaluation, quality and risk management

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Deliverables

- D6.1 Management & Coordination plan (M3, M12)
 - Responsible: CSPA
- D6.2 FAIR Data management plan (DMP) (M6; M18)
 - Responsible: CSPA

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.1 – Coordination, reporting and data management

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- Intranet
- Management structure
- Technical and admin reporting
- Data management and ethics compliance (WP4)

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.1 – Coordination, reporting and data management

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- **Intranet**
- Management structure
- Technical and admin reporting
- Data management and ethics compliance (WP4)

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.1 – Coordination, reporting and data management

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- Intranet
- **Management structure**
- Technical and admin reporting
- Data management and ethics compliance (WP4)

Task 6.1 – Coordination, reporting and data management

Management structure: consortium agreement

- First draft elaborated by Consulta Europa and reviewed by CSPA-SESPA-FICYT
- First draft sent to partners: 29 March
- Final version sent to partners: 16 May
- Current state: signature by partners

Task 6.1 – Coordination, reporting and data management

Management structure: consortium agreement

Section 1	Definitions.
Section 2	Purpose: to specify with respect to the Project the relationship among the Parties, in particular concerning the organization of the work between the Parties, the management of the Project and the rights and obligations of the Parties concerning inter alia liability, Access Rights and dispute resolution.
Section 3	Entry into force, duration and termination. Entry into force: 1 May 2022. Article 3.1: This Consortium Agreement shall have effect from the Effective Date identified at the beginning of this Consortium Agreement that will be the same as the starting date of the project IDEAHL. An entity becomes a Party to this Consortium Agreement upon signature of this Consortium Agreement by a duly authorised representative.
Section 4	Responsibilities of parties.
Section 5	Liability towards each other.

Task 6.1 – Coordination, reporting and data management

Management structure: consortium agreement

Section 6	Governance Structure. 6.2.1. Representation in meetings. Any Party which is a member of a Consortium Body : <ul style="list-style-type: none">• Should be present or represented at any meeting;• May appoint a substitute or a proxy to attend and vote at any meeting;• And shall participate in a cooperative manner in the meetings. 6.2.3. Voting Rules Decisions shall be taken by a majority of two-thirds (2/3) of the votes.
Section 7	Financial Provisions.
Section 8	Responsibilities of parties.
Section 9	Access rights.
Section 10	Non-disclosure of information.
Section 11	Miscellaneous.
Section 12	Signatures.

Task 6.1 – Coordination, reporting and data management

Management structure: consortium bodies

- Management Board (MB)
- Steering Committee (SC)
- General Assembly (GA)
- Advisory Board (AB)

Task 6.1 – Coordination, reporting and data management

Management structure: Coordination team

SCIENTIFIC COORDINATION TEAM		CSPA-SESPA	
Marta Pisano González	CSPA	Head of the Service of Person-Centered Care and Autonomy	Martamaria.PisanoGonzalez@asturias.org
María Jesús Rodríguez Nachón	CSPA	Head of the Section of Person-Centered Care and Autonomy	Mariajesus.rodriгуeznachon@asturias.org
Sergio Gallego Riestra	CSPA	DPO-Data Protection Officer	Sergiommanuel.gallegoriestra@asturias.org
Isabel Díez Valcarce	SESPA	European projects researcher - Service of Person-Centered Care and Autonomy	isabel.diez@sespa.es
Cristina Fernández García	SESPA	Coordinator of training - Service of Person-Centered Care and Autonomy	cristina.fernandezgga@sespa.es
Mónica López Ventoso	SESPA	Quality supervisor and coordinator of the Plan of Humanization	monica.lopezventoso@asturias.org
Pablo Herrero Puente	SESPA	Ethics Committee of Asturias	pabloherrero71@hotmail.com
Beatriz Braña Marcos	SESPA	Ethics Committee of Asturias	Beatriz.branam@sespa.es
FINANCIAL, ADMINISTRATIVE AND QULITY ASSURANCE COORDINATION TEAM		FICYT	
Inés Rey Hidalgo	FICYT	Manager of the Office of the European Projects	inesrey@ficyt.es
Raquel Ochoa González	FICYT	Technician of the Office of the European Projects	raquel.ochoa@ficyt.es

Task 6.1 – Coordination, reporting and data management

Management structure: Management Board (MB)

PROJECT AND SCIENTIFIC COORDINATOR			
Marta Pisano González	CSPA	Head of the Service of Person-Centered Care and Autonomy	Martamaria.PisanoGonzalez@asturias.org
PROJECT MANAGER			
Inés Rey Hidalgo	FICYT	Manager of the Office of the European Projects of Asturias	inesrey@ficyt.es
CO-CREATION MANAGER			
Michelle Perello	CONSULTA EUROPA	Manager of Consulta Europa	michelle.perello@consulta-europa.com

Task 6.1 – Coordination, reporting and data management

Management structure: Steering Committee (SC)

STEERING COMMITTEE

WP leader	Acronym	Role	Representative	E-mail	Substitute	E-mail
6	CSPA-SESPA-FICYT	Chair	Marta Pisano González	Martamaria.PisanoGonzalez@asturias.org	Inés Rey	inesrey@ficyt.es
1	UCN	Member	Diana Schack Thoft	dst@ucn.dk		
2	CE	Member	Michelle Perello	michelle.perello@consulta-europa.com	Beatrice Avagnina	beatrice.avagnina@consulta-europa.com
3	MLHSA	Member	Kai Lars Schnackenberg	kai.schnackenberg@soziales.hamburg.de	Lena Schulze	lena.schulze@soziales.hamburg.de
4	CSPA-SESPA	Member	Cristina Fernández	cristina.fernandezgga@sespa.es	Isabel Díez Valcarce	isabel.diez@sespa.es
5	CEI	Member	Gian Matteo Apuzzo	apuzzo@cei.int		

Task 6.1 – Coordination, reporting and data management

Management structure: General Assembly (GA)

GENERAL ASSEMBLY					
Acronym	Role	Representative	E-mail	Substitute	E-mail
CSPA	Chair	Marta Pisano González	Martamaria.PisanoGonzalez@asturias.org	María Jesús Rodríguez Nachón	Mariajesus.rodrigueznachon@asturias.org
SESPA	Member	Cristina Fernández García	cristina.fernandezgga@sespa.es	Isabel Díez Valcarce	isabel.diez@sespa.es
FICYT	Member	Inés Rey Hidalgo	inesrey@ficyt.es	Raquel Ochoa González	raquel.ochoa@ficyt.es
CE	Member	Michelle Perello	michelle.perello@consulta-europa.com	Beatrice Avagnina	beatrice.avagnina@consulta-europa.com
ISRAA	Member	Oscar Zanutto	faber@israa.it		
RMIT	Member	Marie Maillart	marie.maillart@rmit.edu.au		
E-SENIORS	Member	Piera Sciamia	pierasciamia.eseniors@gmail.com		
EIWH	Member	Yolanda Marleen	info@eurohealth.ie		
CEI	Member	Gian Matteo Apuzzo	apuzzo@cei.int		
MLHSA	Member	Kai Lars Schnackenberg	kai.schnackenberg@soziales.hamburg.de		
UCN	Member	Diana Schack Thoft	dst@ucn.dk		
MDH	Member	Sarah Wamala-Andersson	Sarah.wamala.andersson@mdu.se		
SeAMK	Member	Katja Valkama	katja.valkama@seamk.fi		
ADIPER	Member	Ángel Barrera	angel.barrera@adiper.es		
ALL DIGITAL	Member	Peter Palvolgyi	peter.palvolgyi@all-digital.org		
CDC	Member	Natalia Machado	nataliamachado@caritascoimbra.pt		

Task 6.1 – Coordination, reporting and data management

Management structure: Advisory Board (AB)

Profiles:

- HL
- (d)HL
- ICT applied to health
- ethics/privacy
- gender
- social innovation issues in health care

Number of experts:

- 2 included at the proposal: Kristine Sorensen and Caroline Costongs
- 11 suggested by the partners
- 1 patients association

Task 6.1 – Coordination, reporting and data management

Management structure: Advisory Board (AB)

ADVISORY BOARD					
Entity	Country	Representative	Role	Expertise	Included
Global Health Literacy Academy	Denmark	Kristine Sørensen	Chair	Health literacy	Confirmed
EuroHealthNet	UK	Caroline Costongs	Member	Geder/policy	Confirmed
RMIT-AU	Australia	Kerryn Butler-Henderson	Member	(d)HL	Proposed by partners
Veneto Region Embassy in Bruxelles	Bruxelles	Elena Curtopassi	Member	Policy making	
City of Rotterdam	Rotterdam	Anthony Polichronakis	Member	Policy making	
SeAMK, Seinäjoki University of Applied Sciences	Seinäjoki/Finland	Dr Päivi Rinne	Member	Social innovation	
Health Service Executive	Dublin Ireland	Maeve Cusack	Member	Gender	
Connect.ie	Dublin Ireland	Martin Maguire	Member	HL	
Past president ECPC, EIWH	Germany	Hildrun Sundseth	Member	Gender	
London City University Barbara Dowling	UK	Barbara Dowling	Member	Gender/legal	
Bavarian Health and Food Safety Authority (scientific health specialist authority of the Bavarian State Ministry of Health), Nuremberg, Germany	Germany, Bavarian	Martina Rimmele, Ph.D.	Member	Health literacy, patients	
University hospital Hamburg - Eppendorf (UKE)	Germany, Hamburg	Dr. phil. Dipl.-Psych. Christopher Kofahl	Member	Health literacy	
IFIC - International Foudnation for Integrated Care	Spain	Arturo Álvarez Rosete	Member	Policy making	
Active Citizenship Network	Italy / Brussels	Maddalena D´urso	Member	Patient association	Meeting: 1 June

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.1 – Coordination, reporting and data management

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- Management structure
- **Technical and admin reporting**
- Data management and ethics compliance (WP4)

Task 6.1 – Coordination, reporting and data management

Technical and admin reporting

- Reporting templates: deliverables
- Justification templates and guidelines
- Publication guidelines

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.1 – Coordination, reporting and data management

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- Management structure
- Technical and admin reporting
- **Data management and ethics compliance (WP4)**

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

D6.2 FAIR Data management plan (DMP)

Data Management Plans (DMPs) are a **key element** of good data management.

A DMP describes the data management life cycle for the data to be collected, processed and/or generated by a Horizon Europe project.

As part of making research data findable, accessible, interoperable and re-usable (FAIR), a **DMP should include information** on:

- the handling of research data during & after the end of the project
- what data will be collected, processed and/or generated
- which methodology & standards will be applied
- whether data will be shared/made open access and
- how data will be curated & preserved (including after the end of the project)

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

D6.2 FAIR Data management plan (DMP)

- Once a project has had its funding approved and has started, we must submit a first version of our DMP (as a deliverable) within the first 6 months of the project (M6).
- The DMP needs to be updated over the course of the project whenever significant changes arise, such as (but not limited to) (M18):
 - new data
 - changes in consortium policies (e.g. new innovation potential, decision to file for a patent)
 - changes in consortium composition and external factors (e.g. new consortium members joining or old members leaving).

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

TASKS

- Task 6.1.- Coordination, reporting and data management
- **Task 6.2.- Kick-off and other periodic meetings**
- Task 6.3.- Internal evaluation, quality and risk management

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

Task 6.2 – Kick-off and other periodic meetings

M1 – M24

Leader: CSPA-SESPA-FICYT

Participants: all partners

Main activities:

- Organization of the meetings

Task 6.2 – Kick-off and other periodic meetings

- Consortium face-to-face meetings (GA, MB, SC):
 - ✓ Kick-off meeting: Oviedo. 24-25 May
 - ✓ Annual meeting: Brussels. **M10-February 2023** (T1.5 policy making event)
 - ✓ Annual meeting. Brussels. **M24-April 2024** (Final Conference)
- MB and SC meetings: monthly virtual meetings:
 - ✓ **2022: 28 June / 26 July / 30 August / 27 September / 25 October / 29 November / 20 December**
 - ✓ **2023: 31 January 2023**
- AB: one meeting per year (GA, MB, SC)

WORK PACKAGE 6

MANAGEMENT, COORDINATION AND QUALITY ASSURANCE

TASKS

- Task 6.1.- Coordination, reporting and data management
- Task 6.2.- Kick-off and other periodic meetings
- **Task 6.3.- Internal evaluation, quality and risk management**



WP6

MANAGEMENT, COORDINATION, AND QUALITY ASSURANCE (Task 6.3)

Raquel Ochoa, FICYT

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Funded by
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INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. Internal evaluation and quality

Project evaluation will verify if the project is being implemented as planned and reaches the objectives in terms of effectiveness and quality.

Evaluation of effectiveness

- Responsible: WP leaders
- Timeline:

WP	Intermediate evaluation	Final evaluation
WP1, WP4, WP5 and WP6	30 April 2023 (M12)	30 April 2024 (M24)
WP2	31 March 2023 (M11)	30 September 2023 (M17)
WP3	31 January 2024 (M21)	30 April 2024 (M24)



Evaluation of quality

- Responsible: All partners
- Timeline: during the whole project and before submitting deliverables to the EC



INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of effectiveness

Methodology: analysis of effectiveness data (provided by WP leaders, in collaboration with task leaders) including stage of development of tasks, milestones, deliverables and key performance indicators (KPIs).

- Tools for data collection: effectiveness questionnaires. Deadline for submission: 2 weeks after reception.

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of effectiveness: templates of effectiveness questionnaires

1st EFFECTIVENESS EVALUATION QUESTIONNAIRE – WP5

Objectives						
HOS.1	To define the dissemination strategy and the indicators for impact assessment				% achieved	
Indicators	Target	Achieved (% what has been done)	Means of verification (where and in what form information on)	Deviations & reasons for deviations (if any)	Corrective actions (if applicable)	
KPI5.1 IDEAHL Dissemination strategy including indicators developed	1					
KPI5.2 Website created and updated	1					
KPI5.3 Channels of social media created and updated	4					
KPI5.4 Number of press releases (News, TV and radio)	40					
KPI5.5 Number of newsletter issued	4					
KPI5.6 Participation in conferences and other events	20					
KPI5.7 IDEAHL final conference	1					
Main barriers:						
Main facilitators:						
Final remarks						
HOS.2	To develop an exploitation & sustainability model for scaling up the EU strategy and to favour the up-take of project results in the EU and beyond				% achieved	
Indicators	Target	Achieved (% what has been done)	Means of verification (where and in what form information on)	Deviations & reasons for deviations (if any)	Corrective actions (if applicable)	
KPI5.8 IDEAHL exploitation & sustainability plan developed	1					
KPI5.9 Call for replicators launched	1					
Main barriers:						
Main facilitators:						
Final remarks						

Milestones						
MS9	Visual identity, website, social media		Due date	31/10/22	Delivery date	
% Achieved	Means of verification	Deviations (if any)	Reasons for deviation	Corrective actions (if applicable)		
Main barriers:						
Main facilitators:						
Final remarks						


Deliverables						
D5.1	Dissemination strategy		Due date	31/07/22	Delivery date	
% Achieved	Deviations (if any)	Reasons for deviation (if applicable)	Corrective actions (if applicable)			
Quality review performed?						
Main barriers:						
Main facilitators:						
Final remarks						
D5.2	Exploitation & sustainability plan		Due date	30/04/22	Delivery date	
% Achieved	Deviations (if any)	Reasons for deviation (if applicable)	Corrective actions (if applicable)			
Quality review performed?						
Main barriers:						
Main facilitators:						
Final remarks						

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of effectiveness

Methodology: analysis of effectiveness data (provided by WP leaders, in collaboration with task leaders) including stage of development of tasks, milestones, deliverables and key performance indicators (KPIs).

- Tools for data collection: effectiveness questionnaires. Deadline: 2 weeks after reception.
- Consensus required: final definition of the KPIs for all the WPs  feedback from WP leaders (and task leaders) will be requested. Deadline: 22 June 2022.

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of effectiveness: objectives and KPIs

WP	Specific objective (SO) / Horizontal objective (HO)	Indicators	Target
WP1 (UCN)	SO1.1. To map EU health literacy (HL) and (digital) health literacy ((d)HL) research and existing practices and to analyse health literacy levels across Member States	KPI1.1 Number of initiatives (projects, existing practices, policies, tools, etc.) analysed	10
		KPI1.2 Workshop with representatives of Champions identified	1
		KPI1.3 EU Health Literacy Atlas updated	1
		KPI1.4 Number of champions and survivors engaged	15
	SO1.2. To engage policy makers	KPI1.5 Policy making event organised	1
		KPI1.6 Number of policy makers reached	20
WP2 (CE)	SO2.1. To develop a comprehensive and inclusive EU Strategy to improve (d)HL	KPI2.1 Creation of the methodology and roadmap	1
		KPI2.2 Minimum number of domains considered (health promotion, disease prevention, treatment, self-care, ethics and inclusiveness) in the EU (d)HL Strategy	6
	SO2.2. To engage a variety of stakeholders at local and regional level, healthcare professionals, social services professionals, citizens and patients, practitioners from education, media, safety & occupational health, environment, food, etc. sectors	KPI2.3 Minimum number of co-creation activities carried out (e.g. workshops, role plays, focus groups)	28
		KPI2.4 Number of countries for implementing co-creation activities	10
		KPI2.5 Number of partners implementing co-creation activities	14
		KPI2.6 Actions for social media campaign implemented (calendar of posts, EU survey, engagement of influencers and online co-creation exercises)	4

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

WP	Specific objective (SO) / Horizontal objective (HO)	Indicators	Target
WP3 (MLHSA)	SO3.1. To implement actions of the (d)HL EU Strategy in the project countries	KPI3.1 Number of workshops/meetings	84
		KPI3.2 Number of reached target groups	15
		KPI3.3 Number of participants	1317
	SO3.2. To monitor the pilot testing's implementation and progress	KPI3.4 Minimum number of surveys and questionnaires received and interviews performed (feedback collected from 50% of the participants)	659
		SO3.3. Development of mechanisms and indicators to assess health literacy levels	KPI3.5 Number of indicators defined for assessing HL levels
	KPI3.6 Development of the EU HL & (d)HL monitoring model		1
WP4 (CSPA)	SO4.1. To ensure relevant ethics, privacy, and inclusive issues (incl. gender) are considered during the development of the EU Strategy for improving (d)HL	KPI4.1 Number of online workshops for integration of inclusion, gender and ethics & privacy framework in the (d) HL Strategy	2
		KPI4.2 Generation of an inclusion, ethics & privacy toolkit	1

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of effectiveness: objectives and KPIs

WP	Specific objective (SO) / Horizontal objective (HO)	Indicators	Target
WP5 (CEI)	HO5.1 To define the dissemination strategy and the indicators for impact assessment	KPI5.1 IDE AHL Dissemination strategy including indicators developed	1
		KPI5.2 Website created and updated	1
		KPI5.3 Channels of social media created and updated	4
		KPI5.4 Number of press releases (News, TV and radio)	40
		KPI5.5 Number of newsletter issued	4
		KPI5.6 Participation in conferences and other events	20
		KPI5.7 IDE AHL final conference	1
	HO5.2. To develop an exploitation & sustainability model for scaling up the EU strategy and to favour the up-take of project results in the EU and beyond	KPI5.8 IDE AHL exploitation & sustainability plan developed	1
		KPI5.9 Call for replicators launched	1
WP6 (CSPA)	HO6.1. To manage the project and ensure results are reached	KPI6.1 Minimum number of meetings of the SC and MB	12
		KPI6.2 Total number of meetings of the GA	3
		KPI6.3 Number of bodies created for project management (AB, SC, MB, GA)	4
		KPI6.4 Consortium agreement elaborated and signed	1
	HO6.2. To monitor the project activities and the quality of project results	KPI6.5 Intermediate and final effectiveness questionnaires submitted and completed	12
		KPI6.6 Final technical report delivered to EC	1
	HO6.3. Risks assessment	KPI6.7 Elaboration of risk plan	1
		KPI6.8 Reviews of risk assessment	3

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

Quality Control will evaluate whether the project goals are met and those are met to the highest standard.

Methodology

The quality of the deliverables will be evaluated following specific **evaluation criteria**:

- ✓ Well structured, logical and clear report
- ✓ The analysis' purpose, objectives and scope are fully explained
- ✓ Appropriate and sound methodology
- ✓ Findings, conclusions, recommendations and lessons learned are based on evidence and sound analysis

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

Methodology

The quality of the deliverables will be evaluated following specific **evaluation criteria**.

- Supporting materials (already available)
 - a) Deliverable template

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables. Deliverable template



IDEAHL

DELIVERABLE NAME

WP1. WP ID



The project "Improving Digital Empowerment for Active Healthy Living (IDEAHL)" has received funding by the Horizon Europe Framework Programme under GA 101057477.



Technical References

Deliverable No.	
Dissemination Level ¹	
Work Package	
Lead beneficiary	
Due date of deliverable	
Actual submission date	

Versions

Version	Person	Partner	Date
##	Author 1	Partner short name	DD Month 20YY
##	Author 2	Partner short name	DD Month 20YY
##	Author 3	Partner short name	DD Month 20YY
##	Author 4	Partner short name	DD Month 20YY

Approved by Coordinator on: XX/XX/202X

Approved by Quality Manager on: XX/XX/202X

Statement of originality: This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both. The publication reflects the author's views. The European Commission is not liable for any use that may be made of the information contained therein.



DELIVERABLE NAME

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INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

Methodology

The quality of the deliverables will be evaluated following specific **evaluation criteria**

- Supporting materials (already available)
 - a) Deliverable template
 - b) Quality evaluation questionnaires

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables. Quality evaluation questionnaires

IDEAHL

QUALITY EVALUATION QUESTIONNAIRE

Section 1 - Well structured, logical and clear report

EQ1. The title page and opening pages provide key basic information?	
Name of deliverable	Yes
WP related to the deliverable	Yes
Name and organization(s) of deliverable author(s)	Yes
The date	Yes
Table of contents, index	Yes
List of acronyms	Yes

EQ2. Executive Summary				
Question	Check list	Remarks <i>(justify checklist selection)</i>	Page	Constructive feedback for future reports <i>(including how to address weaknesses and maintaining good practice)</i>
(a) Is an executive summary included as part of the deliverable? If the answer is No, question (b) to (d) should be N/A	Yes			
(b) Does the executive summary contain all the necessary elements? Necessary elements include overview of the object; objectives and intended audience; methodology; most important findings and conclusions.	Yes			
(c) Can the executive summary stand alone? It should not require reference to the rest of the deliverable documents and should not introduce new information.	Yes			
Executive Feedback on Section 1 <i>Issues for this section relevant for feedback (positives & negatives). Up to two sentences.</i>				

Funded by the European Union

The project "Improving Digital Empowerment for Active Healthy Living (IDEAHL)" has received funding by the Horizon Europe Framework 101057477.

Section 2: Purpose, objectives and scope

EQ3. Are the deliverable's purpose, objectives and scope sufficiently clear?				
Question	Checklist	Remarks <i>(justify checklist selection)</i>	Page	Constructive feedback for future reports <i>(including how to address weaknesses and maintaining good practice)</i>
EQ9. Is the purpose of the deliverable clear? This includes why the reported action is needed at this time, who needs the information, what information is needed, how the information will be used.	Yes			
EQ10. Are the objectives and scope of the deliverable clear and realistic? This includes: Objectives should be clear; Scope should clearly described.	Yes			
EQ11. Do the objective and scope relate to the purpose? The reasons for holding the action at this time in the project cycle (purpose) should link logically with the specific objectives the action seeks to achieve and the boundaries chosen for the action (scope).	Yes			
Executive Feedback on Section 3 <i>Issues for this section relevant for feedback (positives & negatives). Up to two sentences.</i>				

Funded by the European Union

The project "Improving Digital Empowerment for Active Healthy Living (IDEAHL)" has received funding by the Horizon Europe Framework 101057477.

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

Methodology

All the deliverables will be reviewed before submission. The evaluation will be carried out through an internal peer review **procedure**:

1. FICYT/CSPA send a reminder at least 6 weeks before the delivery due date following the review procedure.
2. FICYT/CSPA receive from the WP leader the final draft of the deliverable **3 weeks before the delivery due date** and forward the deliverable and the Quality Evaluation Questionnaires to the internal reviewers for quality control.
3. Reviewers check the deliverable and send back comments to FICYT/CSPA 1 week after.
4. The deliverable author integrates the reviewers' comments in the final version of the deliverable within a period of 1 week.
5. The deliverables' author(s) send the final version of the deliverable to FICYT/CSPA for submission.

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

Methodology

All the deliverables will be reviewed before submission. The evaluation will be carried out through an internal peer review **procedure**.

A proposal for the **reviewers** for each deliverable is proposed. **Feedback from all partners will be very welcome.**

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

WP leader	WP	No	Deliverable name	Lead participant	Deadline for submission through Sygma	Reviewers		Deadline - delivery for review	Deadline - review submitted	Deadline - final version to FICYT
UCN	1	D1.1	Report on (d)HL	UCN	31/10/2022	CSPA	RMIT	10/10/2022	17/10/2022	24/10/2022
		D1.2	EU Health Literacy Atlas	RMIT	31/03/2023	UCN	SeAMK	10/03/2023	17/03/2023	24/03/2023
		D1.3	Report on policy-making event	CEI	31/03/2023	UCN	ADIPER	10/03/2023	17/03/2023	24/03/2023
CE	2	D2.1	Co-creation methodology	CE	31/01/2023	ISRAA	CSPA	10/01/2023	17/01/2023	24/01/2023
		D2.2	Report on co-creation	ISRAA	31/08/2023	E-SENIORS	ADIPER	10/08/2023	17/08/2023	24/08/2023
		D2.3	IDEAHL EU (d)HL Strategy	CSPA	30/09/2023	E-SENIORS	ISRAA	08/09/2023	15/09/2023	22/09/2023
MLHSA	3	D3.1	Report on (d)HL Strategy implementation	MLHSA	30/04/2024	CEI	E-SENIORS	09/04/2024	16/04/2024	23/04/2024
		D3.2	EU HL & (d)HL monitoring model schemes	MDH	30/04/2024	MLHSA	EIWH	09/04/2024	16/04/2024	23/04/2024

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. INTERNAL EVALUATION AND QUALITY

Evaluation of Quality: review of deliverables

WP leader	WP	No	Deliverable name	Lead participant	Deadline for submission through Sygma	Reviewers		Deadline - delivery for review	Deadline – review submitted	Deadline - final version to FICYT
CSPA	4	D4.1	IDEAHL inclusion, ethics & privacy toolkit (V.1, V.2, V.3)	CSPA	31/12/2022	EIWH	CE	09/12/2022	16/12/2022	23/12/2022
					31/10/2023	MLHSA	SeAMK	10/10/2023	17/10/2023	24/10/2023
					30/04/2024	MLHSA	SeAMK	09/04/2024	16/04/2024	23/04/2024
CEI	5	D5.1	Dissemination strategy (V.1, V.2, V.3)	CEI	31/07/2022	CSPA	All Digital	08/07/2022	15/07/2022	22/07/2022
					30/04/2023	MDH	All Digital	07/04/2023	14/04/2023	21/04/2023
		D5.2	Exploitation & Sustainability plan	MDH	30/04/2024	CEI	ADIPER	09/04/2024	16/04/2024	23/04/2024
CSPA/ FICYT	6	D6.1	Management & Coordination plan	CSPA/FICYT	31/07/2022	CE	CDC	10/07/2022	17/07/2022	24/07/2022
					30/04/2023	CE	CEI	07/04/2023	07/04/2023	07/04/2023
		D6.2	FAIR Data management plan	CSPA/FICYT	31/10/2022	RMIT	CDC	10/10/2022	17/10/2022	24/10/2022
					31/10/2023	RMIT	CDC	10/10/2023	17/10/2023	24/10/2023

INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

B. RISK ASSESSMENT



✓ IDEAHL Risk plan

Methodology

- Risk monitoring: May 2022 - April 2024
- A review of the risks and prevention and corrective measures will be requested to all partners **every 6 months.**

A review of the risks and prevention measures already identified in the proposal will be requested to all partners → shared document



INTERNAL EVALUATION, QUALITY AND RISK ASSESSMENT

A. RISK ASSESSMENT. Preliminary risks

Risk No	Date	WP	Risk Description	Impact (1-5)	Likelihood (1-5)
R1	24/05/2022	All	Lack of coordination among partnership	5	2
R2	24/05/2022	All	Internal conflicts within the partnership	5	2
R3	24/05/2022	6	Difficulties of the partners for carrying out the financial justification	3	2
R4	24/05/2022	All	Delays in face-to-face activities due to future COVID-19 evolution	5	3
R5	24/05/2022	All	Deliverables of low quality	3	2
R6	24/05/2022	3	Low participation of stakeholders in the co-creation	3	3
R7	24/05/2022	2, 3, 4	Lack of policymakers support	5	3
R8	24/05/2022	2	Large drop-out of participants in co-creation and validation activities	5	3



Kick-off meeting

24-25 May 2022

WP6
MANAGEMENT, COORDINATION AND
QUALITY ASSURANCE
Inés Rey - FICYT



The project: "Improving Digital Empowerment for Active Healthy Living" (IDEAHL) has received funding by the Horizon Europe Framework Programme under GA 101057477



Funded by
the European Union

WP6

PROJECT MANAGEMENT AND FINANCIAL ISSUES

- Payments
- Technical and financial justification

WP6

PAYMENTS

- TOTAL FUNDING: 2.791.350 €
- FUNDING RATE: 100%
- Payments by the EC to the coordinator:
 - one initial pre-financing payment
 - **No interim payments**
 - one payment of the balance

INITIAL PRE-FINANCING PAYMENT:

- Pre-financing payment (article 4.2 of Data Sheet): **2.233.080 € (80%)**
- Time to pay by the Commission to the coordinator: **4 July 2022**
- Article 4.2 Data Sheet of the Grant Agreement: 30 days, either from the entry into force of the Agreement or from 10 days before the starting date of the action, whichever is the latest.
 - Starting date of the action (article 1 of Data Sheet): **1 May 2022.**
 - Entry into force of the Agreement: the agreement will enter into force on the day of the signature by the granting authority or the coordinator, depending on which is the latest (article 44 of the GA): **3 June 2022.**
- Article 22.1. the coordinator must distribute the payments between the beneficiaries without unjustified delay: **one week after receiving the payment from EC – 11 July 2022.**
- Article 4.2: the prefinancing may be distributed only if the minimum number of beneficiaries set out in the call conditions (if any) **have acceded to the Agreement and only to beneficiaries that have acceded.**

GRANT AGREEMENT:

Pending signatures of the partners: following the signature by the Agency, the other partners of the consortium will have **30 days to sign the Accession Form (4 July 2022)**.

- Article 40.1 of the GA: the beneficiaries which are not coordinator must accede to the grant by signing the accession form (see Annex 3) directly in the Portal Grant Preparation tool, within 30 days after the entry into force of the Agreement.
- By signing the Agreement and the accession forms, the beneficiaries accept the grant and agree to implement the action under their own responsibility and in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

INITIAL PRE-FINANCING PAYMENT:

Participant	Personnel costs (€)	Purchase costs – Travel and subsistence (€)	Purchase costs – Other goods, works, services (€)	Indirect costs (25%) (€)	Total eligible (€)	Pre-financing (80%) (€)
CSPA	11.000,00			13.750,00	24.750,00	19.800,00
SESPA	5.500,00			11.000,00	16.500,00	13.200,00
FICYT	197.000,00	22.300,00	9.800,00	36.650,00	265.750,00	212.600,00
CE	150.000,00	7.800,00	5.000,00	40.700,00	203.500,00	162.800,00
ISRAA	140.000,00	7.700,00	6.000,00	38.425,00	192.125,00	153.700,00
RMIT	137.500,00	7.580,00	13.000,00	39.520,00	197.600,00	158.080,00
E-SENIORS	121.000,00	7.700,00	5.000,00	33.425,00	167.125,00	133.700,00
EIWH	144.000,00	7.700,00	4.500,00	39.050,00	195.250,00	156.200,00
CEI	144.000,00	7.700,00	11.500,00	40.800,00	204.000,00	163.200,00
MLHSA	160.000,00	7.700,00	4.500,00	43.050,00	215.250,00	172.200,00
UCN	168.000,00	7.700,00	4.500,00	45.050,00	225.250,00	180.200,00
MDH	152.000,00	7.700,00	5.500,00	41.300,00	206.500,00	165.200,00
SeAMK	144.000,00	7.900,00	8.500,00	40.100,00	200.500,00	160.400,00
ADIPER	137.700,00	7.600,00	5.500,00	37.700,00	188.500,00	150.800,00
ALL DIGITAL	126.000,00	6.300,00	9.500,00	35.450,00	177.250,00	141.800,00
CARITAS	78.000,00	7.700,00	3.500,00	22.300,00	111.500,00	89.200,00
TOTAL	2.015.700,00	121.080,00	96.300,00	558.270,00	2.791.350,00	2.233.080,00



WP6

PAYMENTS

NO INTERIM PAYMENT

FINAL PAYMENT

- Article 22.3.4 of GA: the balance (final payment) is calculated by deducting the total amount of prefinancing and interim payments already made (if any), from the final grant amount.
- Mutual Insurance Mechanism (MIM): MIM contribution: 5% of the maximum grant amount (139 567.50 €), retained from the initial prefinancing.
- Article 4.2 of Data Sheet: 90 days from receiving the periodic report: **30 September 2024**
 - End of reporting period: **30 April 2024**
 - Deadline for the submission of the Periodic report: 60 days after end of reporting period: **30 June 2024**

FINAL PAYMENT:

Participant	Personnel costs (€)	Purchase costs – Travel and subsistence (€)	Purchase costs – Other goods, works, services (€)	Indirect costs (25%) (€)	Total eligible (€)	Pre-financing (€)	Final payment (€)
CSPA	11.000,00			13.750,00	24.750,00	19.800,00	4.950,00
SESPA	5.500,00			11.000,00	16.500,00	13.200,00	3.300,00
FICYT	197.000,00	22.300,00	9.800,00	36.650,00	265.750,00	212.600,00	53.150,00
CE	150.000,00	7.800,00	5.000,00	40.700,00	203.500,00	162.800,00	40.700,00
ISRAA	140.000,00	7.700,00	6.000,00	38.425,00	192.125,00	153.700,00	38.425,00
RMIT	137.500,00	7.580,00	13.000,00	39.520,00	197.600,00	158.080,00	39.520,00
E-SENIORS	121.000,00	7.700,00	5.000,00	33.425,00	167.125,00	133.700,00	33.425,00
EIWH	144.000,00	7.700,00	4.500,00	39.050,00	195.250,00	156.200,00	39.050,00
CEI	144.000,00	7.700,00	11.500,00	40.800,00	204.000,00	163.200,00	40.800,00
MLHSA	160.000,00	7.700,00	4.500,00	43.050,00	215.250,00	172.200,00	43.050,00
UCN	168.000,00	7.700,00	4.500,00	45.050,00	225.250,00	180.200,00	45.050,00
MDH	152.000,00	7.700,00	5.500,00	41.300,00	206.500,00	165.200,00	41.300,00
SeAMK	144.000,00	7.900,00	8.500,00	40.100,00	200.500,00	160.400,00	40.100,00
ADIPER	137.700,00	7.600,00	5.500,00	37.700,00	188.500,00	150.800,00	37.700,00
ALL DIGITAL	126.000,00	6.300,00	9.500,00	35.450,00	177.250,00	141.800,00	35.450,00
CARITAS	78.000,00	7.700,00	3.500,00	22.300,00	111.500,00	89.200,00	22.300,00
TOTAL	2.015.700,00	121.080,00	96.300,00	558.270,00	2.791.350,00	2.233.080,00	558.270,00



TOTAL PAYMENTS:

Participant	Funding contribution (€)	Pre-financing (€)	Final payment (€)	Total Payment (€)
CSPA	24.750,00	19.800,00	4.950,00	24.750,00
SESPA	16.500,00	13.200,00	3.300,00	16.500,00
FICYT	265.750,00	212.600,00	53.150,00	265.750,00
CE	203.500,00	162.800,00	40.700,00	203.500,00
ISRAA	192.125,00	153.700,00	38.425,00	192.125,00
RMIT	197.600,00	158.080,00	39.520,00	197.600,00
E-SENIORS	167.125,00	133.700,00	33.425,00	167.125,00
EIWH	195.250,00	156.200,00	39.050,00	195.250,00
CEI	204.000,00	163.200,00	40.800,00	204.000,00
MLHSA	215.250,00	172.200,00	43.050,00	215.250,00
UCN	225.250,00	180.200,00	45.050,00	225.250,00
MDH	206.500,00	165.200,00	41.300,00	206.500,00
SeAMK	200.500,00	160.400,00	40.100,00	200.500,00
ADIPER	188.500,00	150.800,00	37.700,00	188.500,00
ALL DIGITAL	177.250,00	141.800,00	35.450,00	177.250,00
CARITAS	111.500,00	89.200,00	22.300,00	111.500,00
TOTAL	2.791.350,00	2.233.080,00	558.270,00	2.791.350,00



WP6

PAYMENTS

For receiving the total amount of funding:

- Each partner must justify the fulfilment of the tasks assigned to them
- Each partner must justify properly the expenses incurred for carrying out the tasks assigned to them

WP6

PROJECT MANAGEMENT AND FINANCIAL ISSUES

- Payments
- **Technical and financial justification**

WP6

TECNICAL AND FINANCIAL JUSTIFICATION

GUIDELINES:

- Management guidelines
- Publication guidelines

D6.1 Management & Coordination plan (M3, M12)
Responsible: CSPA

WP6

TECNICAL AND FINANCIAL JUSTIFICATION

MANAGEMENT GUIDELINES:

- Technical justification
- Financial justification
- Dissemination requirements according to the Grant Agreement

TECHNICAL JUSTIFICATION:

- Continuous reporting (deliverables, milestones, outputs/outcomes, critical risks, indicators,...)
- Periodic reporting
- Final reporting

CONTINUOUS REPORTING – Deliverables:

Nº WP Nº	Nº Deliverable	Deliverable name	Lead beneficiary	Type	Dissemination	Delivery date
1	D1.1	Report on (d)HL	UCN	R	PU	M6
1	D1.2	EU Health Literacy Atlas	RMIT	OTHER	PU	M11
1	D1.3	Report on policy-making event	CEI	R	PU	M11
2	D2.1	Co-creation methodology	CE	R	PU	M9
2	D2.2	Report on co-creation	ISRAA	R	PU	M16
2	D2.3	IDEAHL EU (d)HL Strategy	CSPA	R	PU	M17
3	D3.1	Report on (d)HL Strategy implementation	MLHSA	R	PU	M24
3	D3.2	EU (d)HL monitoring model scheme	MDU	R	PU	M24
4	D4.1	IDEAHL inclusion, ethics & privacy toolkit v.1	CSPA	R	PU	M8
4	D4.2	IDEAHL inclusion, ethics & privacy toolkit v.2	CSPA	R	PU	M18
4	D4.3	IDEAHL inclusion, ethics & privacy toolkit v.3	CSPA	R	PU	M24
5	D5.1	Dissemination strategy v.1	CEI	R	PU	M3
5	D5.2	Dissemination strategy v.2	CEI	R	PU	M12
5	D5.3	Dissemination strategy v.3	CEI	R	PU	M24
5	D5.4	Exploitation & Sustainability plan	MDU	R	PU	M24
6	D6.1	Management & Coordination Plan v1	CSPA	R	SEN	M3
6	D6.2	Management & Coordination Plan v2	CSPA	R	SEN	M12
6	D6.3	FAIR Data management plan v1	CSPA	R	SEN	M6
6	D6.4	FAIR Data management plan v2	CSPA	R	SEN	M18



CONTINUOUS REPORTING – Milestones:

Nº WP	Nº Milestone	Milestone name	Lead beneficiary	Due date	Means of verification
1	1	Mapping of (d)HL completed	MLHSA	M6	Report on (d)HL with findings from the analysis of the current literature and practices and monitoring mechanisms and indicators drafted at M6.
1	2	Endorsement of policy makers	CEI	M10	Positive feedback on the project from policy makers in the high-level policy making event organised at M10.
2	3	Methodology for co-creation	CE	M9	Methodology drafted: it will include a theoretical introduction and concrete design approaches, along with operational steps for the implementation.
2	4	Improvement targets and areas for the EU (d)HL Strategy	CSPA	M7	Based on WP1 results, targets and areas for improvement to be tackled within the EU (d)HL Strategy will be defined, to be considered in the co-creation process.
2	5	EU (d)HL Strategy developed	CSPA	M17	Building on co-creation results, the EU (d)HL Strategy will be established, and a report (D2.3) will be prepared.
3	6	Initiatives to pilot and national coordinators agreed	MLHSA	M18	Partners will agree on a list of actions of the EU Strategy to be piloted at project country level. A national coordinator per project country will be appointed.
3	7	EU (d)HL Strategy evaluation	MLHSA	M24	Quantitative and qualitative evaluation and impact assessment implemented, and summary reports produced.
4	8	Gender/cultural/socioeconomic inclusivity framework	CSPA	M8	A strategy (D4.1) with recommendations about gender and cultural adaptation of (d)HL initiatives, considering socio-economic variables, will be prepared.
5	9	Visual identity, website, social media	CEI	M6	Visual identity for dissemination will be developed. It will be applied to project website and social media.



PERIODIC AND FINAL TECHNICAL REPORTING:

REPORTS TO THE COORDINATOR:

- Periodic reports: **every 3 months**
- Final technical report: **15 May 2024**

REPORTS TO EC:

- Final Technical report to the EC: 1 final report after the end of the project.
 - End of the project: 30 April 2024
 - Deadline for the submission to the coordinator: **15 May 2024**
 - Deadline for the submission to EC: 60 days after the end of the project: **30 June 2024**
- Templates and reminders for periodic and final reports

PROJECT REVIEW BY EC:

Review Nº	Timing (month)	Location	Comments
RV1	12	Online or, if physical meeting, venue to be determined	Project review to assess deliverables and progress

FINANCIAL STATEMENTS TO THE COORDINATOR:

- Periodic financial statements: **every 6 months**
- Deadline for submission of the first one (M1 to M6): **15 November 2022**
- Final financial statement: **15 May 2024**

FINANCIAL STATEMENTS TO EC:

- Final Financial statement to the EC: 1 financial statement after the end of the project.
 - End of the project: 30 April 2024
 - Deadline for the submission to the coordinator for review: **15 May 2024**
 - Deadline for the submission to EC: 60 days after the end of the project: **30 June 2024**
 - **Each partner has to submit its own financial statement to EC.**
- Templates and reminders for periodic and final statements

RECOMENDATIONS

- Involve the accountancy staff from the very beginning in the project
- Read carefully the Grant Agreement
- Ask the coordination team whenever you need support
- General rules on eligibility of costs:
 - Costs must be directly linked to the execution of the project
 - Costs must be reflected in the Grant Agreement (Annex 1 and 2: budget and proposal) or otherwise communicated to the coordinator for approval

ELIGIBLE COSTS

ELIGIBILITY CONDITIONS

- they must be actually incurred by the beneficiary
- they must be incurred in the period set out in Article 4 (with the exception of costs relating to the submission of the final periodic report, which may be incurred afterwards; see Article 21 of the GA)
- they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
- they must be incurred in connection with the action as described in Annex 1 and necessary for its implementation
- they must be identifiable and verifiable, in particular recorded in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's usual cost accounting practices they must comply with the applicable national law on taxes, labour and social security and they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency

ELIGIBLE COSTS

DIRECT COSTS

- Personnel Costs
- Subcontracting costs
- Purchase costs – Travel and subsistence
- Purchase costs – Other goods, works, services
- Purchase costs - Equipment
- Other costs categories: internally invoiced goods and services

INDIRECT COSTS

ELIGIBLE COSTS – DIRECT COSTS:

Personnel Costs (article 6.2 of the GA):

- Eligible as personnel costs if they fulfil the general eligibility conditions and are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action.
- Categories: Employees, Natural persons under direct contract, Seconded persons, SME owners and natural person beneficiaries.
- Personnel costs must be included in Annex I of the Grant Agreement.
- All the partners can include new researchers/staff in the project **after previous request to the coordinator of the project**, if not included in the GA. The coordinator will inform the Project Officer.
- They must be limited to salaries (including net payments during parental leave), social security contributions, taxes and other costs linked to the remuneration, if they arise from national law or the employment contract (or equivalent appointing act) and be calculated on the basis of the costs actually incurred.

ELIGIBLE COSTS – DIRECT COSTS:

Personnel Costs (article 6.2 of the GA) – CALCULATION METHODS:

1) DAILY RATE:

Daily rate for the person multiplied by the number of day-equivalents worked on the action (rounded up or down to the nearest half-day)

Daily rate must be calculated as: annual personnel costs for the person divided by 215

- The number of day-equivalents declared for a person must be identifiable and verifiable (see Article 20).
- The actual time spent on parental leave by a person assigned to the action may be deducted from the 215 days indicated in the above formula.
- The total number of day-equivalents declared in EU grants, for a person for a year, cannot be higher than 215, minus time spent on parental leave (if any).
- See GA for supplementary payments.

ELIGIBLE COSTS – DIRECT COSTS:

Personnel Costs (article 6.2 of the GA) – CALCULATION METHODS:

2) AVERAGE PERSONNEL COSTS:

Average personnel costs (unit cost according to usual cost accounting practices), the personnel costs must fulfil the general eligibility conditions for such unit costs and the daily rate must be calculated:

- using the actual personnel costs recorded in the beneficiary's accounts and excluding any costs which are ineligible or already included in other budget categories; the actual personnel costs may be adjusted on the basis of budgeted or estimated elements, if they are relevant for calculating the personnel costs, reasonable and correspond to objective and verifiable information

And

- according to usual cost accounting practices which are applied in a consistent manner, based on objective criteria, regardless of the source of funding.

ELIGIBLE COSTS

Subcontracting costs: **only if previously authorized**

Purchase costs - travel and subsistence: on the basis of the costs actually incurred and in line with the beneficiary's usual practices on travel

Purchase costs – Other goods, works, services: consumables and supplies, promotion, dissemination, protection of results, translations, publications, certificates and financial guarantees, if required under the Agreement

Purchase costs – Equipment: **only if previously authorised**

Other costs categories: internally invoiced goods and services: directly used for the action may be declared as unit cost according to usual cost accounting practices, if and as declared eligible in the call conditions

Indirect costs:

- 25% **of direct costs duly justified**
- not supporting documents needed

Keeping records and supporting documents (article 20 if the GA):

- The beneficiaries must — **at least until the time-limit set out in the Data Sheet (see Point 6)** — keep records and other supporting documents to prove the proper implementation of the action in line with the accepted standards in the respective field (if any).
- **Supporting documents for actual costs:** adequate records and supporting documents to prove the costs declared (such as **contracts, pay-slips, subcontracts, invoices and accounting records**); in addition, the beneficiaries' usual accounting and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts and the amounts stated in the supporting documents.
- **For invoices:** include **“Project IDEAHL. Ref. 101057477”** in the concept of the invoice.
- **For personnel costs:** time worked for the beneficiary under the action must be supported by declarations signed monthly by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept alternative evidence supporting the time worked for the action declared, if it considers that it offers an adequate level of assurance.

Keeping records and supporting documents:

PERSONNEL COSTS - NEW FOR 2021-2027

Under Art. 20 of the HE Model Grant Agreement, for persons who work for the action, the beneficiary may either:

- a) use reliable time records (i.e. time-sheets) either on paper or in a computer-based time recording system, to record (at least) all the hours worked in the action. Reliable time records must be **dated and signed at least monthly by the person working for the action and their supervisor**. If the time recording system is computer-based, the signatures may be electronic (i.e. linking the electronic identity data, e.g. a password and user name, to the electronic validation data), with a documented and secure process for managing user rights and an auditable log of all electronic transactions.

Or

- b) sign a monthly declaration on days spent for the action.

If the beneficiary keeps both set of documents (time-sheets and monthly declarations), they must be consistent. In case of discrepancies, only the set of documents recording the lower amount of days will be accepted.

ELIGIBLE COSTS – DIRECT COSTS:

Keeping records and supporting documents (article 20 of the GA):

Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Time declaration: V1.1 – 01.05.2022



EU GRANTS DECLARATION OF DAYS WORKED ON A PROJECT		YEAR:		
<i>To be filled in and uploaded as deliverable in the Funding & Tenders Portal Grant Management System, at the due date foreseen in the system.</i>				
Project acronym:		Project number:		
Participant name:				
Name of the person:	Type of personnel: <small>(employee/ natural person under direct contract/ seconded/ other)</small>			
Month	Days worked in the action ¹ <small>(e.g. 15, 7, 5, 0, 5)</small>	Work Packages worked on <small>(e.g. WP2; WP5)</small>	Date and signature of the person	Name, date and signature of the supervisor
January			Signature: Date:	Name: Signature: Date:
February			Signature: Date:	Name: Signature: Date:
March			Signature: Date:	Name: Signature: Date:
April			Signature: Date:	Name: Signature: Date:
May			Signature: Date:	Name: Signature: Date:

Keeping records and supporting documents (article 9 of the Annotated Model Grant Agreement v0.2):

If the beneficiary records the time worked in hours rather than in days, for example because that is their usual management practice, they must convert the total hours worked into day-equivalents to calculate the personnel costs for the grant (i.e. number of days x daily rate).

They must do this conversion each time that they calculate a daily rate. To make this conversion, and so to calculate the number of day-equivalents, they simply have to divide the number of hours worked by the person on the action during the reporting period by the number of hours of a day-equivalent. The resulting figure must be rounded up or down to the nearest half-day (for example: 17,79 = 18 days; 17,64 = 17,5 days). The number of hours of a day equivalent is one of the following:

- 8 hours
- the average number of hours that the person must work per working day according to the contract. For example, if the contract says that the person must work 37,5 hours per week distributed in 5 working days, a day-equivalent for the person is 7,5 hours (37,5 / 5) (please note that this option cannot be used if the contract does not allow to determine the average number of hours that the person must work per working day).
- If they have a usual cost accounting practice determining the standard number of annual productive hours of a full-time employee, they may determine the value of a day equivalent as follows: {The higher between the standard number of annual productive hours of a full-time employee according to your usual practice and 90 % of the standard annual workable hours of a full-time employee divided by 215}

The option chosen must be applied consistently; using the same option at least per group of personnel employed under similar conditions (e.g. same type of contract, same cost-centre).

MANAGEMENT GUIDELINES:

VISIBILITY / EUROPEAN FLAG AND STATEMENT (article 17.2 of the GA)

Unless otherwise agreed with the granting authority, **communication activities of the beneficiaries related to the action** (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), **dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate)**

The emblem must remain **distinct and separate** and cannot be modified by adding other visual marks, brands or text.

Apart from the emblem, **no other visual identity or logo may be used to highlight the EU support.**

When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be **displayed at least as prominently and visibly as the other logos.**

VISIBILITY / EUROPEAN FLAG AND STATEMENT (article 17.2 of the GA)



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The project “Improving Digital Empowerment for Active Healthy Living (IDEAHL)” has received funding by the Horizon Europe Framework Programme under GA Ref 101057477



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