Project review guidelines

- ITEA monitors the running projects on a regular base to ensure the high level quality of the ITEA labelled projects.

- Monitoring of running projects is done by means of Project Progress Reports (PPRs) and Project Reviews.
  - PPRs are handled in a separate instruction video
  - A Project Review is a face-to-face project evaluation of half a day by a multidiscipline review team

- The aim of a Project Review is to
  - monitor if a project is heading towards successful innovative and exploitable results and
  - if applicable, provide recommendations to the project consortium how to achieve these results

Introduction
Project view

- From a project point of view, project reviews are a supporting tool to achieve a core target: delivering a well thought-out and high-quality innovation to generate strong impact on the market.

- The spirit of a review is to help the project to achieve successful results and not to judge the project.
  - questions and remarks from experienced reviewers are meant to trigger the right actions, to focus on the right issues, to ensure that technological considerations do not eclipse market evolutions and trends.
  - if a project has encountered any issues, it is in the consortium's interest to mention them and to profit from the reviewers' recommendations.

Project Review planning (1)

- Planning of the reviews is done at least 6 months in advance by the ITEA Office and fixed when confirmed by the project leader and the review team.
  - The planned and confirmed project reviews are published on the review schedule at the ITEA Community website (item Calendar)
  - Once a review is planned and confirmed we only accept request for changes of dates and/or location in very exceptional cases

- The first review is planned roughly 1 year after the project start date.
  - Following reviews are planned approximately between 9-12 months later
  - The last review will take place shortly before the end date of the project

Project Review planning (2)

- A project review lasts normally about half a day (am or pm reviews), i.e. 4 hours max.
  - To optimise the workload and travel time for the reviewers, project reviews are often planned together with another project review in two following days. The first one takes place in the afternoon and the second one in the morning of the next day.

- A review is hosted by one of the project partners.
  - A city or region where one of the partners is located is proposed by the ITEA Office.
  - A specific location may be requested by the project leader, however the ITEA Office will take the final decision considering the constraints of all participants.
  - The review team takes care of their own costs; other costs are for the project team.

- **Project team:**
  - Obliged:
    - Project Leader (obliged)
    - WP leaders (obliged)
    - Any key / relevant partner
  - Optional:
    - Project Mentor (if possible a project mentor (ITEA Steering Group member) is assigned to support the team with preparing the review)
    - Other project members
    - Other stakeholders (management, customers, etc.)
- **The project review team and project leader are published on the ITEA Community website (item Calendar / *project name* Review #x / Attendees)**
  - The project leader can add the project members that will be present at the review to the list

Review participants
Project Review Team

- Review team:
  - The chairperson (ITEA Chairwoman or ITEA Vice-chairman)
  - 2 ITEA Steering Group reviewers
    - We strive to have at least one reviewer following your project from the start to the end
    - A third reviewer is assigned as Spare reviewer, who can replace one of the two Steering Group reviewers in case of unforeseen circumstances
  - An external expert (optional - assigned by the Public Authorities and representing the ITEA Authorities Committee (ITAC))
  - A Public Authorities representative (optional)
    - You are free to invite your national PA, for instance to combine the ITEA review with a national review
  - A secretary (one of the ITEA Programme Coordinators)

Review participants
Confidentiality

- All participants that are not members of the project consortium, i.e. ITEA reviewers, ITEA Office members & external experts (assigned by Public Authorities), have signed a Declaration of Non-Disclosure beforehand.

- Public Authorities do not sign a DND, because they are bound to confidentiality by their labour contract.

- The duly signed DND will entitle the experts to access to all project documents that are uploaded to the ITEA website and needed for the review.

Review preparation (1)

- For the review preparation the project team should:
  - Send invitation to the review team (1 month before)
    - Provide detailed info about the review agenda, location & room, schedule travel instructions and hotels

  - Submission of (document) deliverables (2 weeks before)
    - upload your deliverables to the project WP area (they will automatically appear in the review area)
    - Upgrade the list of Exploitation Related Achievements (exploitation, dissemination, standardisation and human capital)

  - Provide the draft review presentations (1 week before)
    - Upload to the review area under "meeting documents"
    - Final presentations must be delivered latest at the start of the review (e.g. on a USB key)

Review preparation (2)

- Have a review rehearsal with the project team (1 day before)
  - Invite your project mentor to the rehearsal to provide feedback

- Each project has a dedicated review area on the ITEA Community website.
  - It can be accessed directly via the Community Calendar tab in the main menu by selecting Review Calendar or via the Management tab (select Calendar) in the project environment
  - It can be used to upload all relevant review documents and send messages to the review team
  - The reviewers have access to the review area and are familiar with it. Therefore it is strongly recommended to use this area and not to use your own environment.

Review meeting agenda

- The review meeting is opened by the project leader or the project mentor. After a short welcome you can ask the Chairperson to make an opening speech.

- Recommended review agenda:
    - Overview of the project
    - Overview of the market
    - Managerial topics
    - Progress status & key achievements, optionally including demonstrations
    - Dissemination, exploitation & standardisation
    - Synthesis: consortium's conclusions
    - Reviewers' private session
    - Reviewers' feedback session
    - Final words by the Chairperson

- Clarify what the underlying problem or opportunity was to initiate this project and furthermore clarify how this project will solve this issue.

- Present the initial goals of the project and quantify them as much as possible. It is acceptable to define the goals in terms of what the project wants to deliver and further describe and quantify the challenges to be addressed.

- Provide an overview of the State-of-the-Art and the main innovations to be achieved by the project.

- Present the consortium per country (use the ITEA map) and position the partners on the market and technical value chain.

- Describe the workpackage structure and partner contributions.

- Explain relation to and cooperation with other projects if applicable, but clarify what the cooperation consists of.

- Explain the current technical State-of-the-Art in the market, the major trends and players in the market. Indicate what is the major innovation provided by the project and what is the impact on the market.

- Explain the current market value chain identifying the different players from suppliers, OEMs, distribution channels, end customers, etc. and position the different partners in the market value chain if applicable.

- Each industrial partner can give a short presentation about their size, products or services, main markets, competitors and indicate their expectation of their specific market opportunities provided by this project.

Review meeting
Managerial topics

- Report on any relevant specific managerial issues (funding issues, conflicts, delays, ..)

- Identify risks and present mitigation plans

- Present the status of the Project Cooperation Agreement signature

- Present the status of the overall workplan
  - Present status of project milestones
  - Present status of deliverables (planned and actual dates)
  - Present the effort planned vs spent per partner from project start until today

- This topic might be kept shorter when the project progresses to a more stable situation

Review meeting
Progress status & key achievements

- Reviewers are interested in the details of the technical achievements in order to give you recommendations.

- Achievements are generally presented per workpackage, but this is not obliged. There are examples of final reviews where the achievements were presented from the use cases and demonstrators.

- Demonstrators are not obliged (especially at the beginning of the project), but highly appreciated towards the end of the project. Integrated demonstrators show strong cooperation within the project.

- The reviewers have a technical background, however are not necessarily experts in the domain, so avoid to many abbreviations or domain specific jargon.

Review meeting
Exploitation related achievements

- Dissemination, standardisation, human capital and exploitation
  - Give an overview of the dissemination of the project results. The reviewers are more interested in industrial-oriented dissemination either within the organisation or towards potential or existing customers.
  - Report on active contributions to standardisations resulting from the project.
  - Report on any human capital related achievements, such as transfer of persons from academia to industry or vice versa, master thesis, new courses, etc.
  - Towards the end of the project it must be clear how the (industrial) partners will exploit the project results in the market or in their own organisations. A clear overview of the exploitation plans and/or results should be presented (obliged in 2nd and 3rd review).

- **Synthesis: consortium's conclusions**
  - The project leader can close the presentations of the project team with a short synthesis and main conclusions.

- **Reviewers' private session**
  - The project team is asked to leave the room, when the review team will discuss the conclusions and actions as prepared by the secretary of the meeting.

- **Reviewers' feedback session**
  - The secretary of the meeting will present the conclusions and actions of the review team to the project team.
  - The final conclusions and actions report will be issued to the project leader after one week.

- **Final words by the Chairperson**
  - The chairwoman/man will close the meeting with a short personal view of the review.

Review guidelines

- Always check online at the ITEA Community website the latest version of the review guidelines:
  - <ITEA Community / Documents & templates / Guidelines & templates / Reviews>
    (login needed)

- Includes:
  - details on the review organisation
  - (typical) meeting structure and (required) content
  - general recommendations for the presentations
  - a description of the specific focus of each review
  - a clear definition of all the required actions in the review preparation period (e.g. invitation email to the reviewers)

For any question or support:
info@itea3.org

ITEA3

Thank you for your attention