Change Request procedure

Change Request
Characteristics

- Several changes might occur after a project is labelled and during the whole project lifetime. Changes in a project need to be reported via a Change Request (CR)
- A Change Request is the formal way of proposing and communicating changes in a labelled project, such as:
  - New partners / withdrawing partners
  - Revised planned effort figures as a result of national funding decision
  - Changes in the work package content
  - New project start / end dates
- A Change Request is the only official way to communicate any changes in the project to the ITEA Office and a guarantee that they are processed.

Changes in total planned costs

- For project partners who never received an ITEA contribution invoice before 1 January 2018 the following rules apply:
  - After the national funding contract has been signed the eligible planned costs of a partner as stated in the contract are presented on the ITEA website.
  - The national contract based cost figures can not be modified anymore, unless a new national funding contract is made.

- For project partners who already received an ITEA contribution invoice before 1 January 2018 the following rules apply:
  - The eligible planned costs are defined in the initial FPP or in the latest submitted Change Request and presented on the ITEA website.
  - Eligible planned costs of the running year and future years can be adapted via Change Request. Cost of the previous year can only be adapted until the end of Q1 of the running year.
  - Changes in total eligible planned costs must be motivated on request of the ITEA Office via national contract data.

Changes in total planned effort

- Changes in total planned effort data in a Change Request can only be approved in cases like the following examples:
  - as a result of a national funding decision
  - as a result of a strategic change agreed in the consortium;
  - based on new insights affecting the planning data for the future work in the project.

- In addition to one of the above, there may be shifts effort from one year to the next (such shifts may or may not be the reason to enter a Change Request – that is up to the consortium to decide).

Changes in planned effort

- Changes to effort of the previous year may be accepted if they are submitted through a Change Request before the **end of Q1** of the running year, and hence accepted by end April / early May.
  - Partners are no longer able to adapt effort of previous year after the Q1 of the year.
  - If such a CR is rejected, the consortium can claim a deadline extension for changing previous year effort of three months after the rejection notification, in order to submit an updated version of the CR (expected to be accepted or rejected by end September at the latest).

Change Request form online

- The Change Request (CR) form is entered fully online:
  - Data (e.g. effort, partners, work package leaders,…) can be changed via the Community website by Project leader and WP leaders. Partners can only update their own data.
  - As soon as all checks are successful, a button “start Change Request” will appear. This will lead you to a form where additional information needs to be filled in (e.g. reason, impact, solution).
  - Furthermore, If the FPP is adapted, you need to upload the new FPP Annex (**not** the merged file) under Management tab (Management>Project management).
  - Once all checks in the CR checklist are successful you can submit the CR.
- The Change Request process can be initiated and submitted only by a project leader (or proxy)
- Make sure to adapt the FPP in line with changes indicated on the change request form
- The evaluation of the submitted CR will only be done by the ITEA Steering Group reviewers, but Public Authorities are informed about the receival and approval of a CR and have access to the CR

Pending evaluation actions

Update status evaluation actions

- During several evaluations (FPP, PPR, previous CR) by the ITEA Steering Group they can provide actions to improve the project.
- All these actions are collected and stored in the project action list tool on the ITEA website (under management tab)

- At several occasions, including the CR evaluations, the ITEA Steering Group reviewers will check the status of the pending actions
- The project leader has to update the status of the project actions that are applicable and report on this in the CR.

First Change Request
Mandatory CR

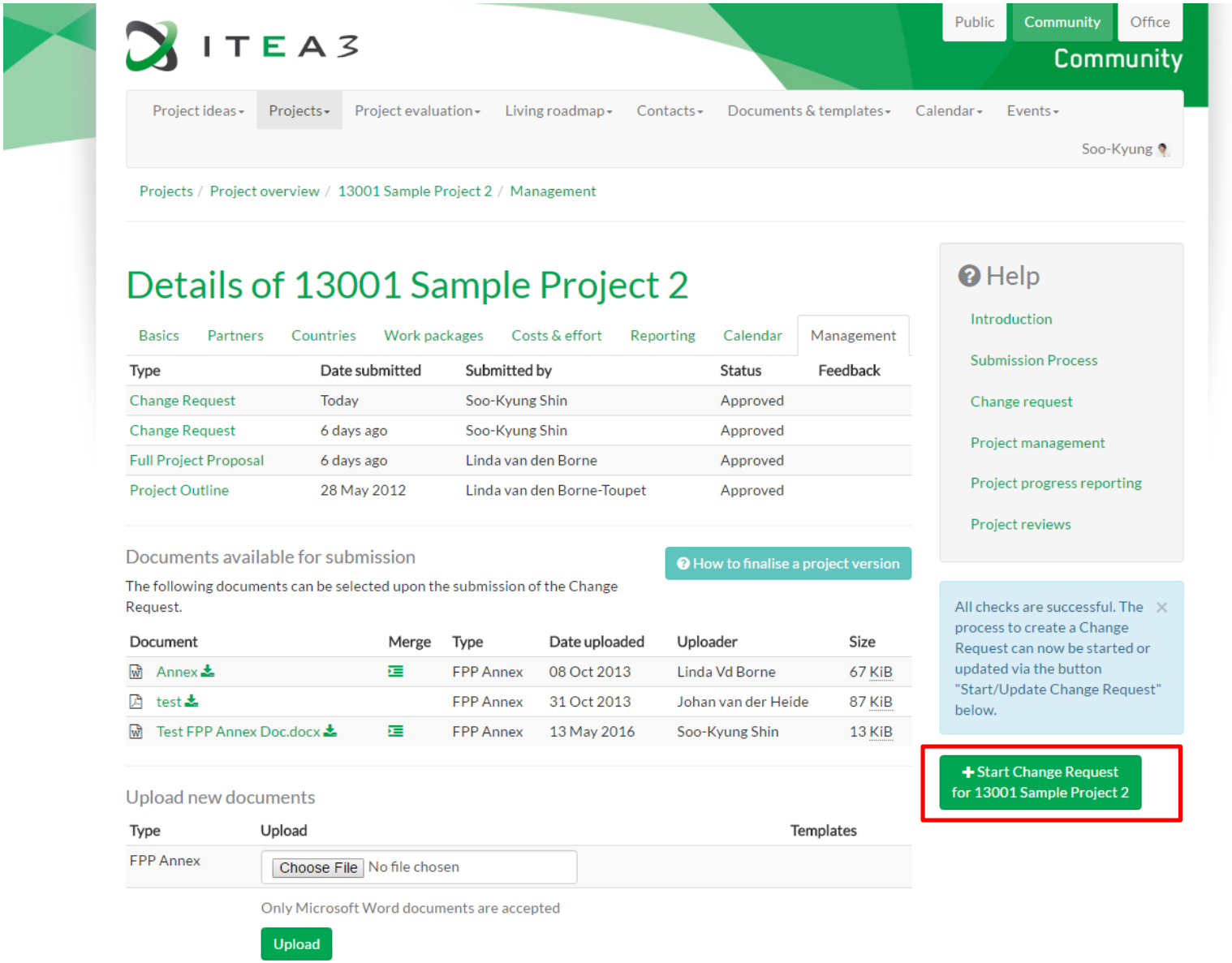
- From ITEA 3 Call 3, the ITEA label has limited validity.

- In case the effort of active partners in a project constitutes less than 50 % of total effort compared to the original FPP before the project kick-off, a CR must be submitted and approved to maintain the ITEA label.

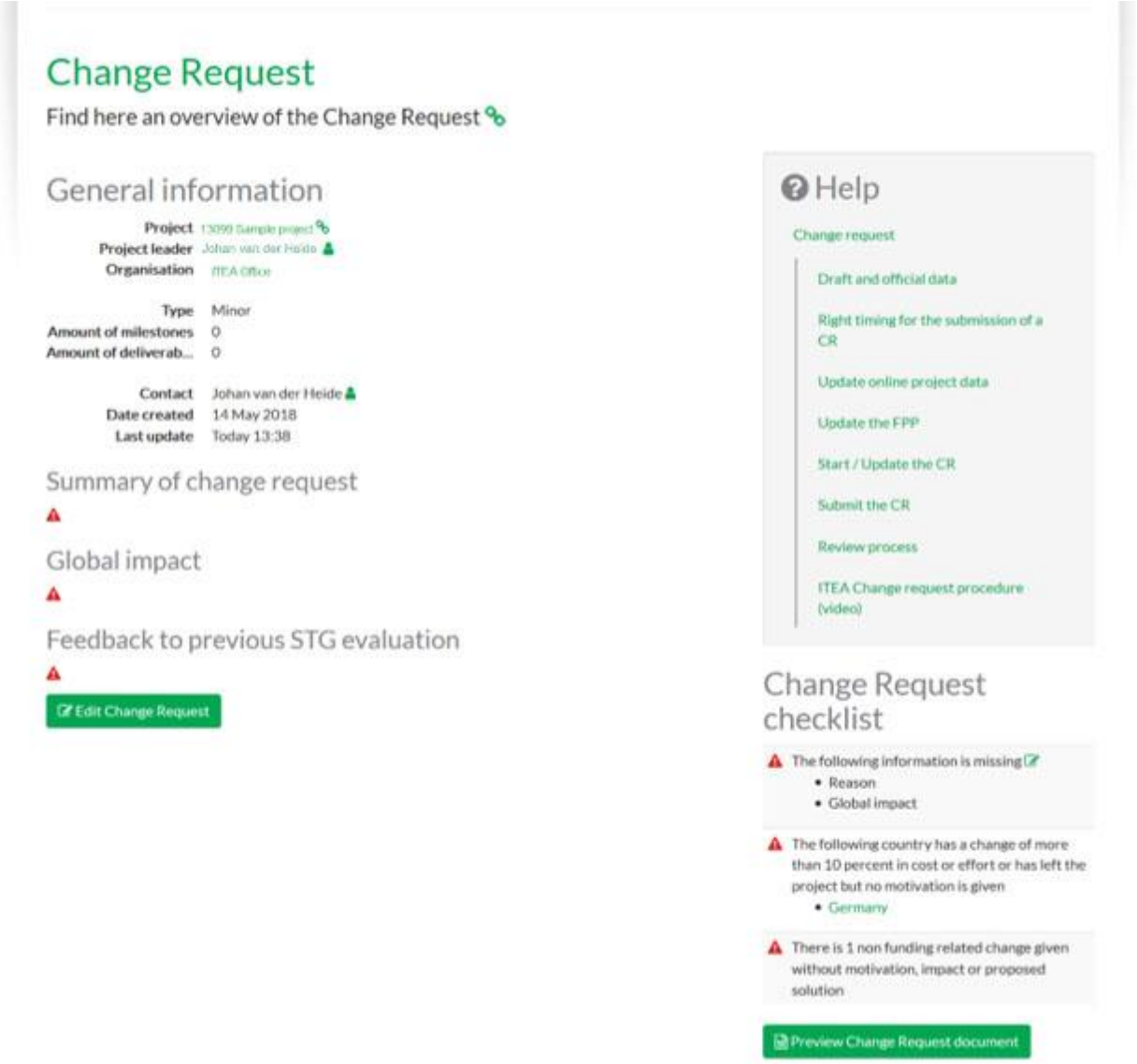
- Active partners belong to one of the following category: funded partners, self-funded partners, partners who are waiting for submitted funding application results.

- Adaptations in the project should reflect the reduced size and the project plan needs to be redefined.

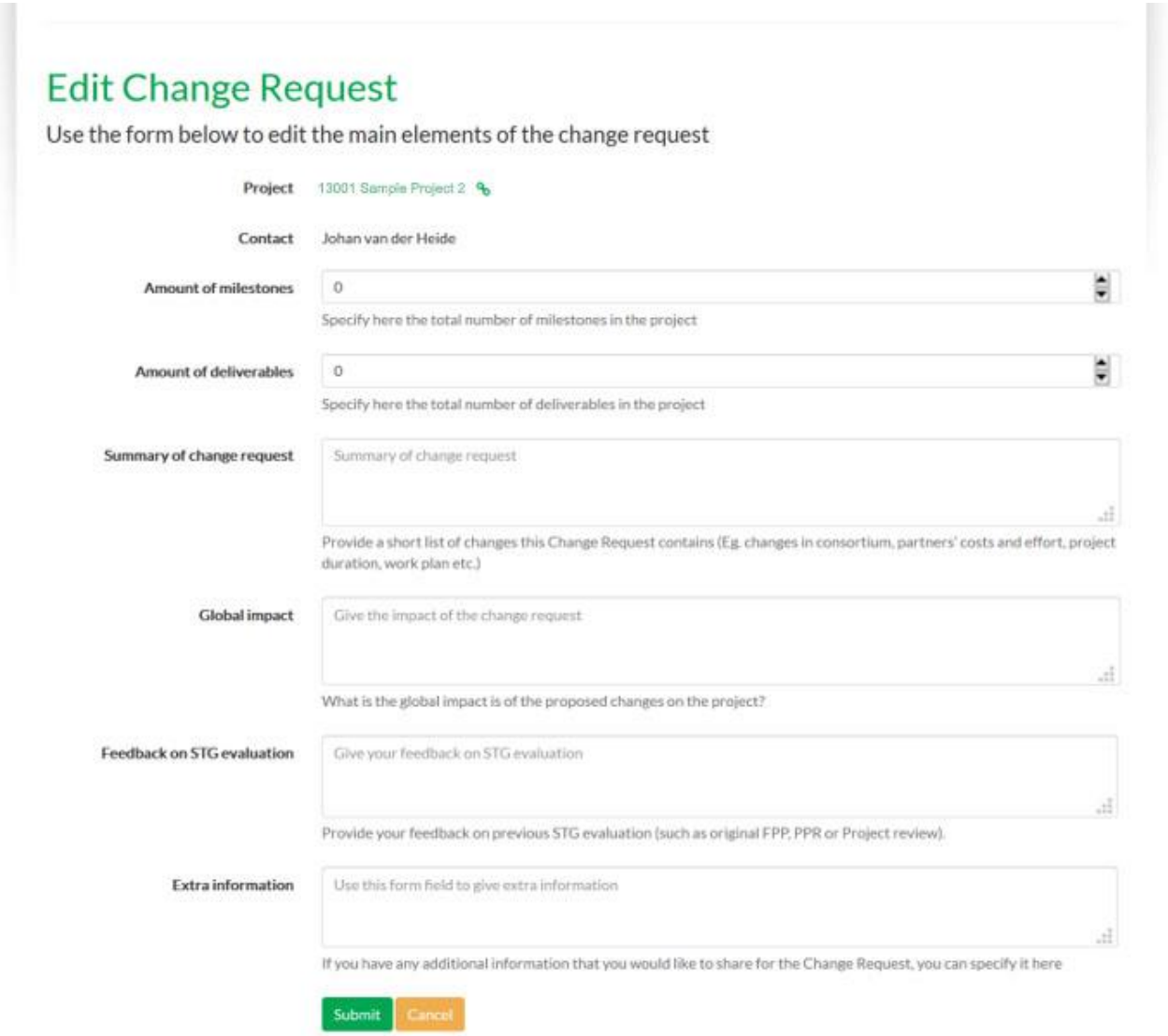
Creating a change request



Online Change Request form (1/2: upper part) screen



Online Change Request form
Edit Change Request page



Edit Change Request

Use the form below to edit the main elements of the change request

Project 13001 Sample Project 2

Contact Johan van der Heide

Amount of milestones 0

Specify here the total number of milestones in the project

Amount of deliverables 0

Specify here the total number of deliverables in the project

Summary of change request Summary of change request

Provide a short list of changes this Change Request contains (E.g. changes in consortium, partners' costs and effort, project duration, work plan etc.)

Global impact Give the impact of the change request

What is the global impact is of the proposed changes on the project?

Feedback on STG evaluation Give your feedback on STG evaluation

Provide your feedback on previous STG evaluation (such as original FPP, PPR or Project review).

Extra information Use this form field to give extra information

If you have any additional information that you would like to share for the Change Request, you can specify it here

Submit Cancel

Online Change Request form (2/2: bottom part) screen

Change Request information

	Before Change Request	After Change Request
Start date	01-09-2015	01-09-2015
End date	31-08-2018	31-08-2018
Effort [PY]	187.43	189.16
Costs [k€]	21,505	22,424
Number of partners	38	38
Amount of milestones	6	0
Amount of deliverables	43	0
	With reference to the first ever submitted FPP	**With respect to the updated FPP**
Delay (+) or advance (-) in months on the end date	0	0

Changed project leader

Project leader in latest version	Current project leader
Soo-kyung Shin	Johan van der Heide

Changed work package leaders

Work package	Work package leader in previous version	Updated Work package leader
WP 1: Use Cases	Soo-kyng Shin	Johan van der Heide

Funding related changes

In case of a national funding related change (Eg. result of a funding application, modification of a national funding contract etc.), click the related country and provide further information.

Country	Type	Last update	Costs previous version	Updated costs	Effort previous version	Updated effort
France	Active	23 days ago	3,844	3,844	34.15	34.15
Germany	Active	29 days ago	7,477	^ 8,396	60.15	^ 62.15
Netherlands	Active	1 month ago	6,598	6,598	45.20	45.20
Sweden	Active	1 month ago	2,362	2,362	15.00	15.00
Turkey	Active	1 month ago	1,224	1,224	32.93	v 32.66

Non funding related changes

In case of a changes in a project which is NOT related to national funding issue, click the below green button to provide further information. Multiple items can be created. Non funding related changes can be related to technical issue (subject more difficult to expected, progresses slower than expected), market related (dramatic modification of the market since the last FPP submission), or an unexpected circumstance such as withdrawal of a partner, for example.

+ Create non funding related change for Change Request for **Sample Project 2**

Online Change Request form
Funding related change report - 1

Funding related changes

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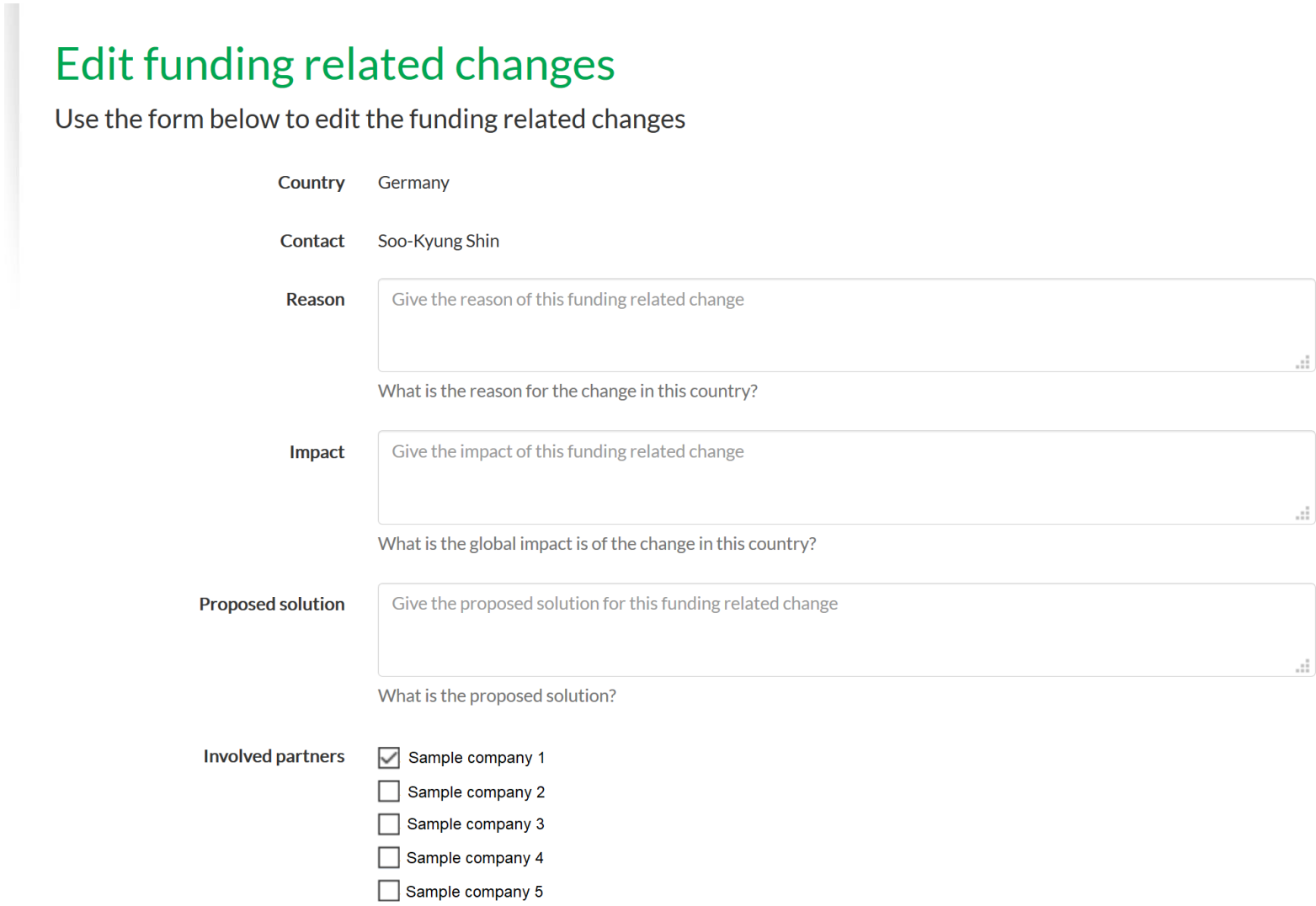
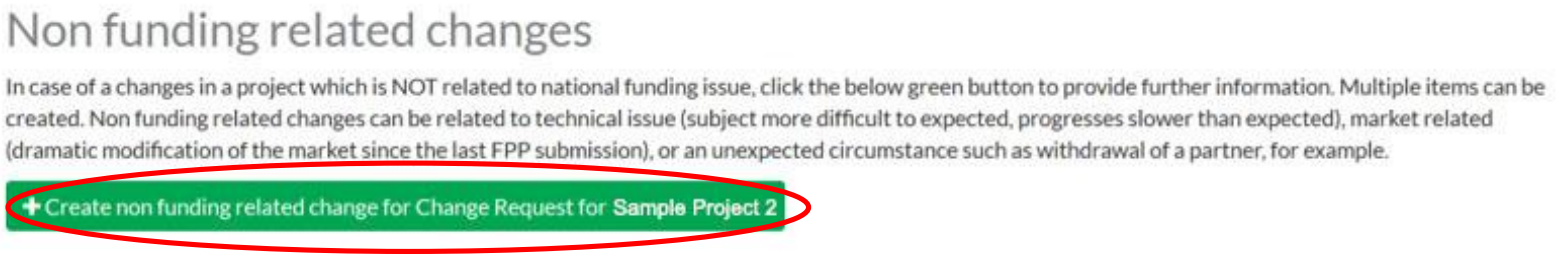
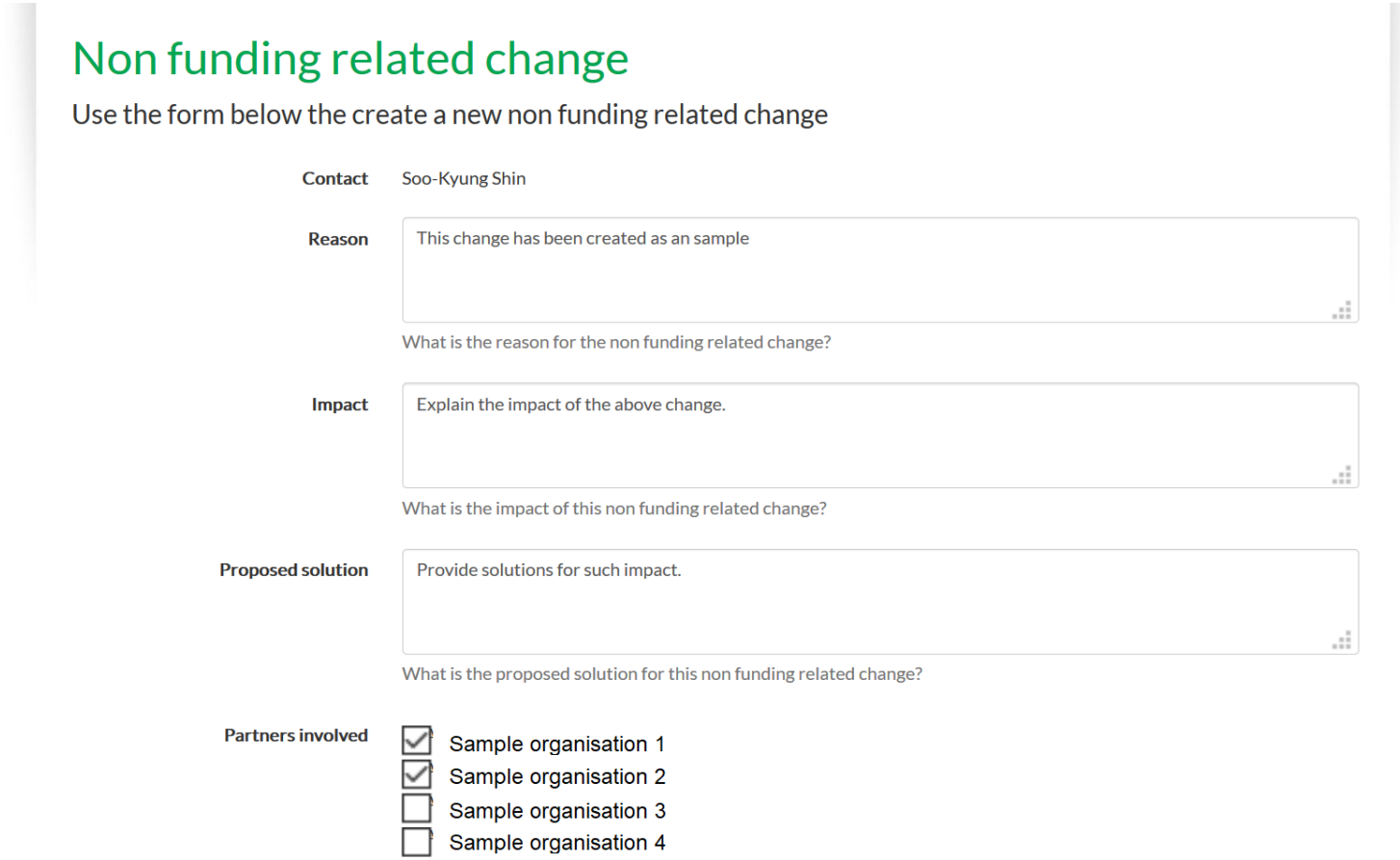
Online Change Request form
Funding related change report - 2



Online Change Request form
Non funding related changes - 1



Online Change Request form
Non funding related changes - 2



Non funding related change

Use the form below the create a new non funding related change

Contact Soo-Kyung Shin

Reason This change has been created as an sample

What is the reason for the non funding related change?

Impact Explain the impact of the above change.

What is the impact of this non funding related change?

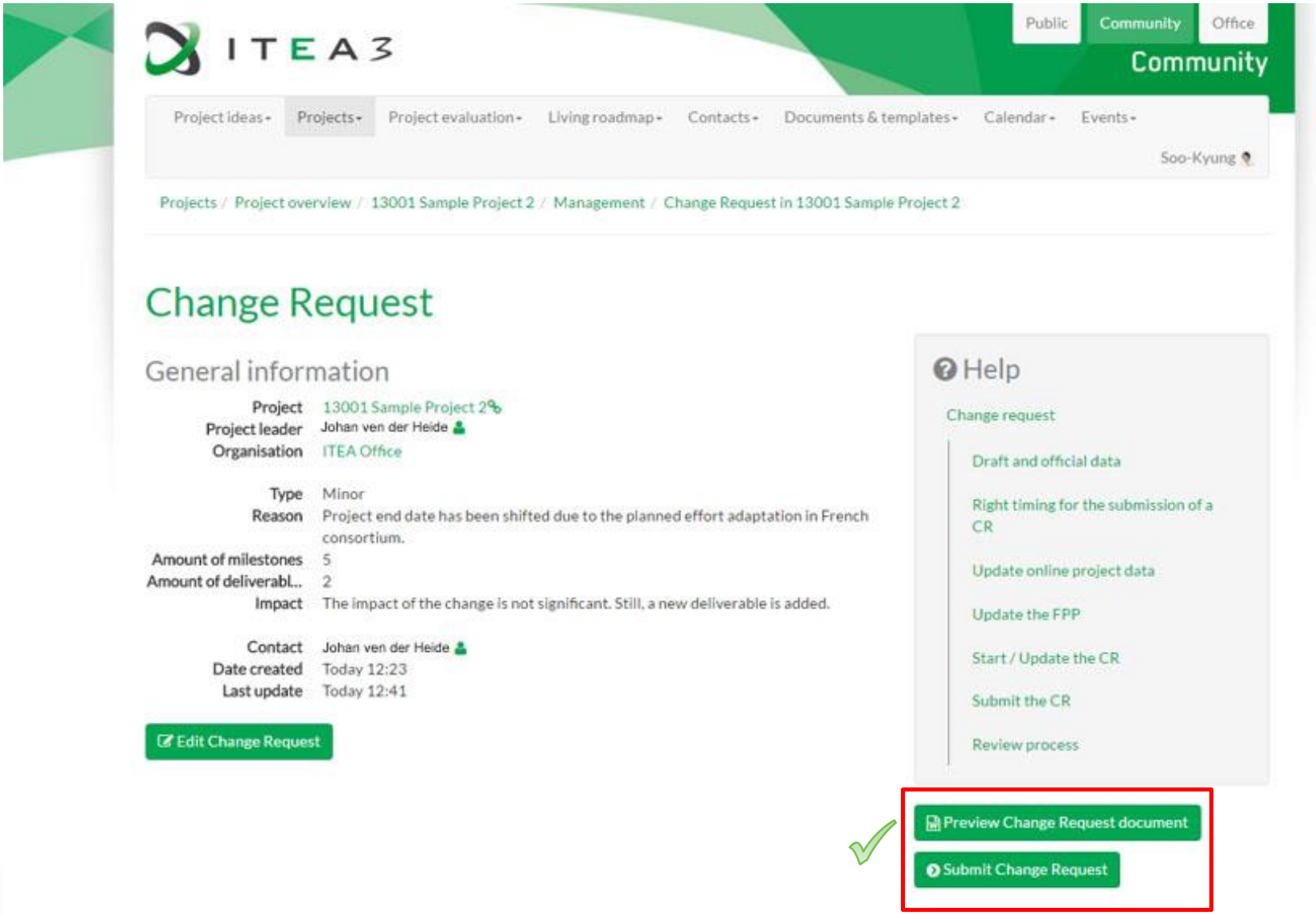
Proposed solution Provide solutions for such impact.

What is the proposed solution for this non funding related change?

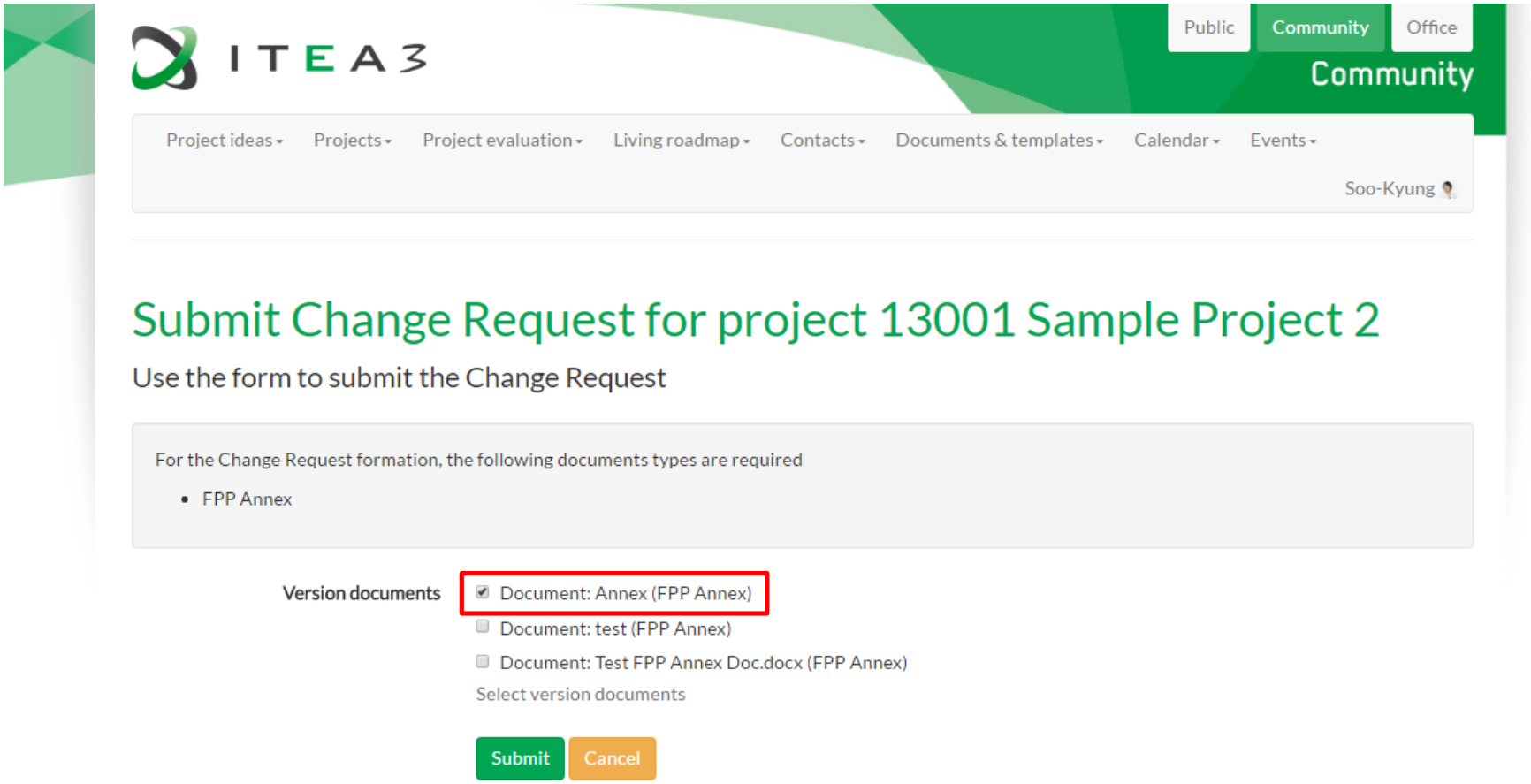
Partners involved

- [x] Sample organisation 1
- [x] Sample organisation 2
- [ ] Sample organisation 3
- [ ] Sample organisation 4

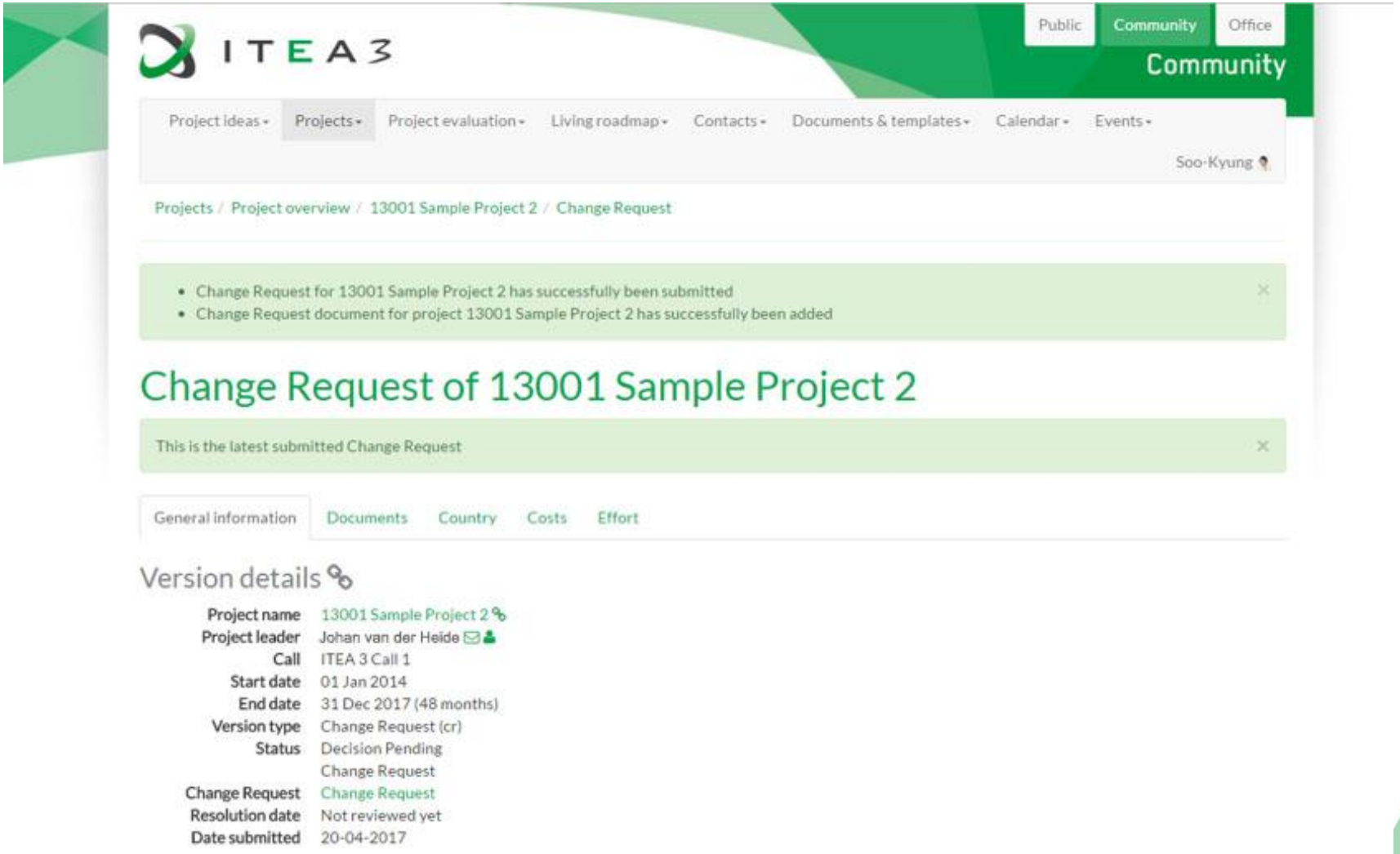
Online Change Request
All checks successful – submission possible



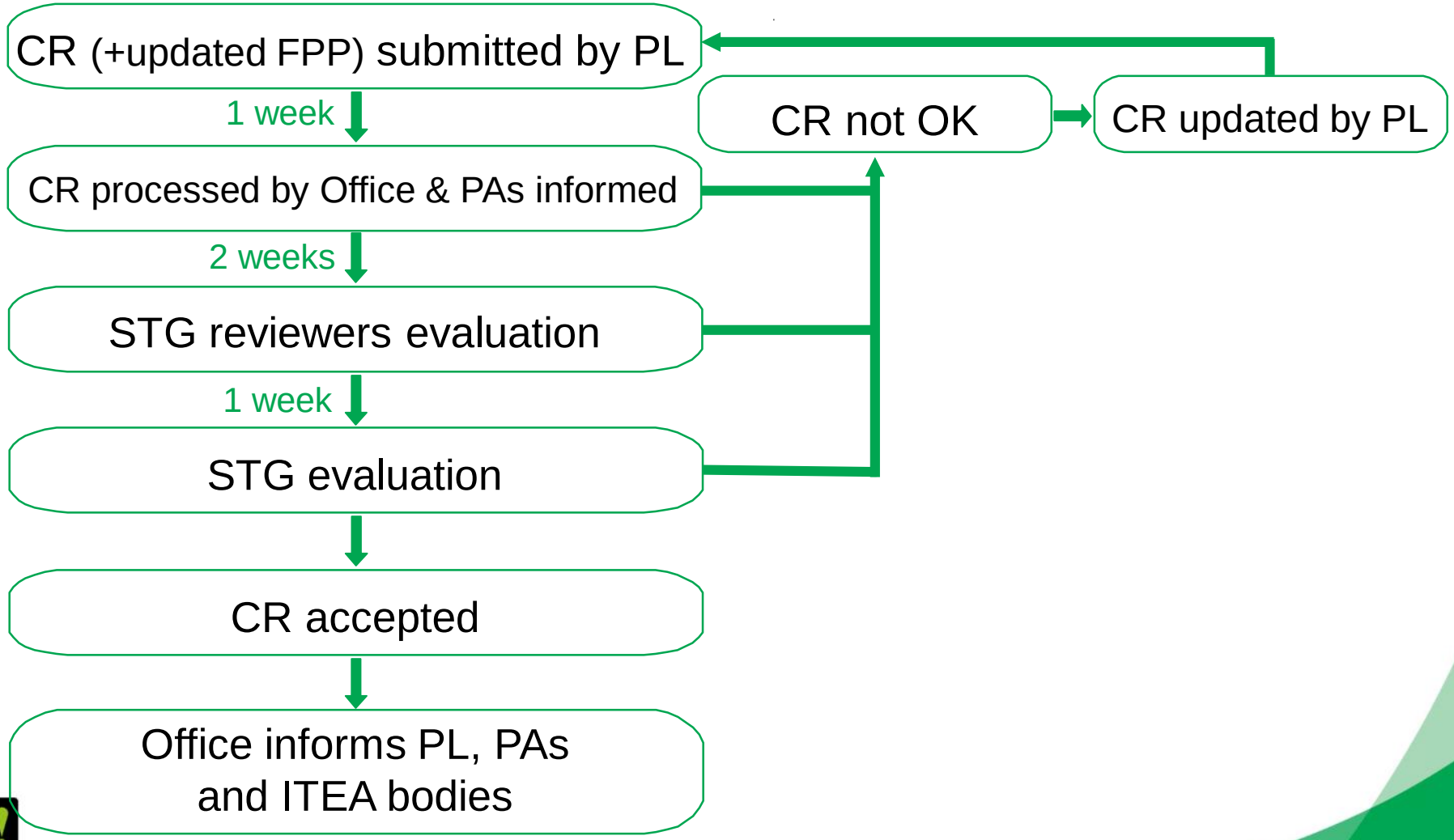
Online Change Request
Submission



Online Change Request
Completed



Change Request
Process



For any question or support:
info@itea3.org
ITEA 3

Thank you for your attention