

Project review guidelines

Introduction

- 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 check if a project is heading towards successful innovative and exploitable results. Advice on corrective measures is provided if necessary.

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 is proposed by the ITEA Office. We try to take into account the preferences of a project team as much as possible, however due to several constraints it is not always possible to fulfil each individual request.
 - In case of a final review the project consortium may give their preference for a specific location.
 - The review team takes care of their own costs; other costs are for the project team.



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 (ITEA Programme Coordinator or occasionally the ITEA Office Director)

Project Team

- Project team:
 - Obligated:
 - 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 preparation

- In order to prepare the review the project team should take the following steps:
 - 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)
 - Optional: Prepare demonstrators
 - 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)
 - Have a review rehearsal with the project team (1 day before)
 - Invite your project mentor to the rehearsal to provide feedback



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
 - Managerial topics
 - Market perspectives and opportunities for partners
 - 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



Review meeting (1)

- Overview of the project
 - 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.



Review meeting (2)

- 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 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
- Market perspectives and opportunities for partners
 - Rather than giving global market figures, the reviewers would like to see the current market trends and what perspectives the results of the project would provide in the current market and how the industrial partners could benefit.

Review meeting (3)

- Progress status & key achievements, optionally including demonstrations
 - Reviewers are interested what has been achieved rather than what has been done.
 - 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 are not necessarily experts in the domain, so avoid to many abbreviations or domain specific jargon.



Review meeting (4)

- Dissemination, standardisation, exploitation and human capital
 - Give an overview of the dissemination of the project results. In ITEA we 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.
 - 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 results and/or plans should be presented (obliged in 2nd and 3rd review).
 - Report on any human capital related achievements, such as transfer of persons from academia to industry or vice versa, master thesis, new courses, etc.

Review meeting (5)

- **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 within 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: Community / Documents & templates / Guidelines & templates / Reviews:
<https://itea3.org/community/publication/overview/category-2/type-15.html>
(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**

Thank you for your attention