## The midterm review of AAL projects

It is intended that projects funded by the AAL Programme are physically reviewed once – approximately 2 months before the mid term of the project.

For the midterm review of AAL projects the procedure below is suggested.

#### Aims

The aims of the review are:

*Performance check / progress check:* the midterm review should clearly aim at checking the performance of the project and to address obstacles that block the progress. Scientific, technological, financial and organisational issues need to be discussed and solutions should be proposed.

*Proactive in relation to the projects:* the review should be pro-active to provide the consortium with a fresh, external view and guidance for the remaining project period with discussion on liaison, dissemination, and exploitation possibilities and challenges; however, some feedback on and control of performance in the previous period of the projects should also be given.

*Proactive in relation to the programme development:* by providing tangible information about each project, that can be aggregated and used for thematic analysis of the call and the programme performance.

#### The format of the midterm review

The midterm review procedure will be done as: A separate physical review of approximately 4 hours, which could be done in connection to a consortium meeting or organised by an agency (NCPs/CMU).

#### The review

The “lead-NCP” should be present and NCP’s from other agencies involved in the project are also invited to attend. The involved NCP’s of a review will be invited by the CMU by e-mail.

The CMU will be represented by at least one person with experience in project reviews and by two international experts (external reviewers).

It would be desirable if the consortium is broadly represented at the review with at least the representation by the coordinator, the business partner, and the leading end-user partner (the three mandatory partner profiles in an AAL project); the technical partner should also be present. The AALA is aware that some project partners fill more than one role.

#### The projects should deliver at least two weeks before the review meeting:

* Updated agenda of the meeting (template page 3)
* Answers to a questionnaire on timing, finance, consortia, etc. (template page 4)
* The publishable factsheet that will be used to create the AAL-yearly brochure (template page 8)
* Provide all relevant, written material in electronic form
  + Last version of DoW
  + Last version of the financial plan
  + Annual reports
  + Due deliverables, including the draft business plan
  + A compressed (zip) file with the public deliverables that will be published at the [deliverables.aal-europe.eu](http://deliverables.aal-europe.eu) website.
  + If appropriate for a better assessment of the project outcomes, draft of the upcoming deliverables
  + Any additional information as brochures, links to videos, articles, presentations, etc.

All material should be available in an electronic format and uploaded (only by the coordinator) on the AAL Programme’s online repository. The link to this repository will be notified to the coordinator four weeks before the midterm review meeting date. When uploading the materials, please order them according to the below mentioned folders (one Zip file for each folder), namely:

- Public deliverables

- Private deliverables

- Administrative documents (DoW, questionnaire, annual reports, fact sheet, financial plan)

- Other documents (dissemination materials, other reports …)

#### The projects should deliver at least one week before the review meeting:

* The presence list of consortium participants;
* Additional information about the venue, security access, transfers, etc.

At that point, the coordinator will be informed if a printed or a digital copy of the presentation should be provided to the review team.

#### The projects should deliver at the review:

* Presentations on:
  + Project structure and finance issues
  + Project content issues - IT and technology perspectives, end-user perspectives, service and business perspectives - that would enable the reviewers to do an assessment as required on the review form.

NB: it is strongly recommended to keep the number of slides to what is strictly necessary and not have too many slides

* Consortium’s reply to the Customer Satisfaction Survey, per consortium participant, via the link <https://www.surveymonkey.com/r/STYK2QP>.

**Suggested Agenda of the Midterm Review Meeting (4 hours)**

***Please adapt it to the project specific needs; notice also that the discussion session can be added to the presentations as Q&A session***

Project Acronym: *(please fill in)*

Meeting date*: (please fill in)*

Meeting time:  *(please fill in)*

Meeting location (country, city, street, room other directions if necessary): *(please fill in)*

Contact person, contact cell phone number*: (please fill in)*

**Starting hour: x**

**Introduction: participant’s presentation, roles, etc.** (CMU or NCPs) - 15 min.

**Project presentations** (project partners) – 2.45 h

1. End user aspect[[1]](#footnote-1)
2. Business and market aspects including wider exploitation plans and dissemination[[2]](#footnote-2)
3. Technical aspects
4. Project structure and management issues (including risks and mitigation of risks, IPR, legal and ethical issues, dissemination and status on the consortium’s reply to the Customer Satisfaction Survey, project financial aspects)
5. Any other issue of interest

**Coffee break - 15 min after half of the presentations.**

**Break** (20 min) (CMU, NCPs, and experts’ internal discussion)

**Conclusion of the review** (CMU, NCP, experts) (10 min)

**Any other issues** (project partners, experts, CMU, NCPs) - 10 min

**Project questionnaire**

Mid-term review of AAL Programme projects

**I. BASIC PROJECT INFORMATION**

Please fill in the table below:

|  |  |
| --- | --- |
| Project acronym & n° |  |
| Project title |  |
| Duration & start date |  |
| Budget | Total € xx Granted (EC+national) € xx |
| Contact | **name e-mail** This e-mail address is being protected from spambots. You need JavaScript enabled to view it |
| Project website |  |

***Remark:***

1. Please, keep the same order of partners **for all tables** starting from “1. Coordinator”.

2. Copy rows for partners if necessary.

**II. CONSORTIUM PARTNERSHIP AND STRUCTURE**

**2.1.** Updated Project Partners’ Contact Details

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Updated Project Partners’ Contact Details** | | | | | |
| **No.** | **Partner Organisation Name** | **Contact Person** | | **Email Address** | **Telephone Number** |
| **Name** | **Last Name** |
| 1  (coord.) | …… | …… | …… | …… | …… |
| 2 | …… | …… | …… | …… | …… |
| 3 | …… | …… | …… | …… | …… |
| …… | *Please add more lines if required* | …… | …… | …… | …… |

**2.2.** Has your project faced any **changes** in the consortium partnership from the submission moment until today?

□ no change

□ yes, please fill in table below.

Insert information about changes in the consortium structure and partnership:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Submission phase**  **Insert all partners** | | | **Changes during negotiation phase**  **(insert only changed/new partners)** | | | **Changes during project running**  **(insert only changed/new partners)** | | |
| Partner name | Country | Type\* | Partner name | Country | Type\* | Partner name | Country | Type\* |
| 1. Coordinator name |  |  |  |  |  |  |  |  |
| 2. |  |  |  |  |  |  |  |  |
| 3. |  |  |  |  |  |  |  |  |

\*Type: please select one of the following: USR (end users); SME (small-medium enterprise); LEA (large enterprise), RES (research); UNI (university); OTH other

**2.3. Please explain reasons for changing partner:**

**2.4. Any other comment related to the structure of the consortium:**

**III. PROJECT TIMING**

**3.1** Please, fill in the table with the date of:

* Receipt of **official letter** with invitation to the negotiation (if applicable)
* Signature **of Grant Agreement**
* Signature of **Consortium Agreement**

Please insert information for EACH PARTNER

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | | | | **Date (DD/MM/YYYY) of** | | |
|  | Partner name | Country | Type | Official letter | Grant Agreement signature | Consortium Agreement signature |
| 1. | Coordinator |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |

**Additional comments:**

**3.2.** Were there any **changes in the project duration** between proposal submission and now?

□ no change

□ yes, please explain.

Planned duration at submission stage: xx months

New duration: xx months

Stage of change:

□ negotiation

□ project running

**3.3 Please explain main reasons for the change**

**IV. FINANCES**

**4.1 Budget (in EURO)**

Please insert below information about budget changes

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | **Final budget after negotiation (Euro)** | | | |
|  | Partner name | Country | Type | Total project cost | Partner contribution | EC\* grant | National \*grant |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |

**If not possible to split the public grant into national and EC - please present the total grant received in AAL Programme (EC+national). If you do so please MARK this clearly in the table.**

If you have any remarks related to the budget please describe here:

**4.2. FINANCIAL FLOW**

**Please insert information on payment requests and payments received**

***Please copy this table for each partner***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Partner name & country  xxxxxxxxxx | **Requested amount**  **Currency** | **Date of request sending** | **Date of receiving money** | **Time of ‘waiting” for payment in months** |
|  |  |  |  |  |  |
| 1 | Request 1 |  |  |  |  |
| 2 | Request2 |  |  |  |  |
| 3 | … |  |  |  |  |

**V. Milestones, demos, workshops and deliverables for the period covered by the review**

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestones, demos, workshops and deliverables** | | | |
| **No.** | **Title** | **Month** | **Remarks** |
|  |  |  |  |
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**VI. OTHER ISSUES**

If the project partners have faced any important difficulties during the management of the project between submission and current date, please describe the difficulties below.

At the submission stage (proposal, electronic tool, partners, etc):

At the negotiation stage:

At the project realization stage:

Other comments:

Thank you!

The NCP’s and the CMU of the AAL Programme

**Project Fact Sheet**

**Name of the project and acronym**

|  |
| --- |
|  |

**Coordinator (company or organization):**

|  |
| --- |
|  |

**Duration of the project and starting date:**

|  |
| --- |
|  |

**Partners:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type (Chose one among these types: End-users, Large Enterprise, SME, R&D)** | **Country** | **Web address** |
| **Name** | **Type (end-users, business, SME, R&D)** | **Country** | **Web address** |

**Objective of the project (7 lines-no more no less):**

|  |
| --- |
|  |

**Project Overview (Including technology in use, end-users involvement – 12 lines sharp):**

|  |
| --- |
|  |

**Expected results and impact (7 lines sharp):**

|  |
| --- |
|  |

**Total budget of the project:**

|  |
| --- |
|  |

**Public Contribution (National + EC):**

**Images or graphic (Logo, images or photos showing the product or service):**Images or photographs (also graphics where needed) **are mandatory**. Send ftp link or esp file.

**Website link(s):**

|  |
| --- |
| **IMPORTANT!!!** |

**Contact person (e-mail, phone, address):**

|  |
| --- |
|  |

1. /2 It is suggested to address these aspects in the first part of the meeting and not let as last item of the agenda [↑](#footnote-ref-1)
2. [↑](#footnote-ref-2)