



## Procedure for the organisation of Mid-Term Reviews

**CONFIDENTIAL**

Date:	11 February 2022
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Version:	V1
Status:	Restricted to AAL Constituency & AAL Beneficiaries

## The midterm review of AAL projects

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In the framework of the AAL monitoring process, a physical review meeting is held once for each project approximately at the mid term of the project.

The Mid-Term review process of AAL projects is presented below.

### *Aims*

The aims of the review are:

*Performance check / progress check:* the Mid-Term review should clearly aim at checking the performance of the project, its outputs and short-term outcomes as well as current and potential obstacles hindering its progress. Scientific, technological, financial and organisational issues need to be discussed and solutions should be proposed.

*Proactivity in relation to the project:* the review should not only aim at assessing the work done but also be pro-active to provide the consortium with a fresh external view and guidance for the remaining project period with discussion on technical, co creation, dissemination, and exploitation possibilities and challenges.

*Proactivity in relation to the programme development and legacy:* the review should provide tangible information about each project, that can be aggregated, used for thematic analysis of the Call as well as to feed the narrative on the legacy and lessons learnt by AAL.

### *The format of the midterm review*

Implemented as a physical review of approximately 4 hours, which could be done in connection to a consortium meeting or organised by an agency (NCPs/CMU). <sup>1</sup>

### *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.

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<sup>1</sup> if a physical meeting is not possible, a hybrid format may be envisaged. Yet in order to have a thorough analysis as well as a meaningful and smooth assessment and discussions among the consortium, the experts, the NCPs and the CMU, a physical meeting shall always be preferred.

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

It is highly desirable that the consortium is equally represented at the review by a member from each consortium participant; the coordinator, the business partner, the technical partner and the leading end-user partner should be mandatorily present at the review meeting. The AAL CMU is aware that some project partners fill more than one role.

## **1. PREPARATION OF THE REVIEW:**

### *2 months before the Mid-Term of the project :*

The CMU will invite the coordinator to start organising the Mid-Term Review, inviting her/him to suggest some dates that would be most suitable for the consortium during the month of the mid-term. The coordinator is also invited to suggest a location for the review. The location should be easily accessible by most of the participants and should allow for a proper demonstration of the solution. Reviews can also be held in Brussels if most suitable.

Once the CMU receives some suggestions of dates and location, the most suitable date for all participants (CMU, NCPs, consortium) is selected and the location confirmed.

The two independent experts who will be performing the review are then selected based on their field of expertise (ICT, End-Users and/or Business).

### *5 weeks before the review meeting:*

The CMU will send a link to the project coordinator for him/her to upload all the necessary documents for the review in the AAL online repository.

### *3 weeks before the review meeting, the coordinator shall provide the following:*

- Updated agenda of the meeting (template page 8)
- Answers to a questionnaire on timing, finance, consortia, etc.
- All relevant, written material in electronic form
  - Last version of Description of Work (DoW)
  - Last version of the financial plan
  - Annual reports
  - Due deliverables, including the draft business plan
  - The public deliverables that will be published on the <http://www.aal-europe.eu/public-deliverables/> website.
  - If appropriate for a better assessment of the project outcomes, draft of the upcoming deliverables

- Any additional information such 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. When uploading the materials, the coordinator should do it according to the below mentioned folders, namely:

- Public deliverables: to be uploaded in the different folders related to the different categories of public deliverables, meaning:
  - End Users*
  - Testing Pilot*
  - Technology*
  - Commercialisation*
  - Privacy & Ethics*
- Private deliverables
- Administrative documents (DoW, questionnaire, annual reports, fact sheet, financial plan)
- Other documents (dissemination materials, other reports ...)

Once received the documents are then shared with the independent experts who receive access to the online repository.

***One week before the review meeting, the coordinator shall provide the following:***

- 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.

***2 weeks after receipt of the due documents:***

AAL independent experts will submit a draft version of the Mid-Term Review report giving a first assessment and set of recommendations following the analysis of the received documents. Focus here will be on inputs and outputs from the project: what has the project produced so far? Is it in line with what has been promised in the DoW? Is it credible? ...

The report will be shared with the consortium at the moment when it is received by the CMU; the consortium will be expected to prepare some concise slides with answers to the specific points of concern and need for clarification expressed by the reviewers in the report.

N.B: presentations have to respect the number of slides and template provided by the AAL Programme.

## 2. Process:

### *Before the Mid-Term Review Meeting*

The CMU will have a briefing with the two independent experts and the NCPs participating in the review, to discuss the first assessment made following the receipt of the documents and highlight the points of attention for the review.

### *During the Mid-Term Review Meeting*

**Part 1:** is dedicated to presentations made by the consortium on the specific points for clarification and/or recommendations received through the draft MTR report. A demonstration of the prototype should also take place.

**Part 2:** will be focusing on the project's potential short-term outputs and outcomes and impact towards the AAL Programme objectives.

#### DEBRIEFING BREAK:

The CMU will have a debriefing with the two independent experts and the NCPs participating in the review, to discuss the outcome of the meeting and prepare some first feedback and recommendations for the consortium to be given during part 3 of the review.

**Part 3:** will focus on the way ahead for the project, recommendations and on the next steps.

### *2 weeks after the Mid-Term Review Meeting*

Independent experts to finalise the Mid-Term Review report, adding their assessment on the outcome of the review and the project.

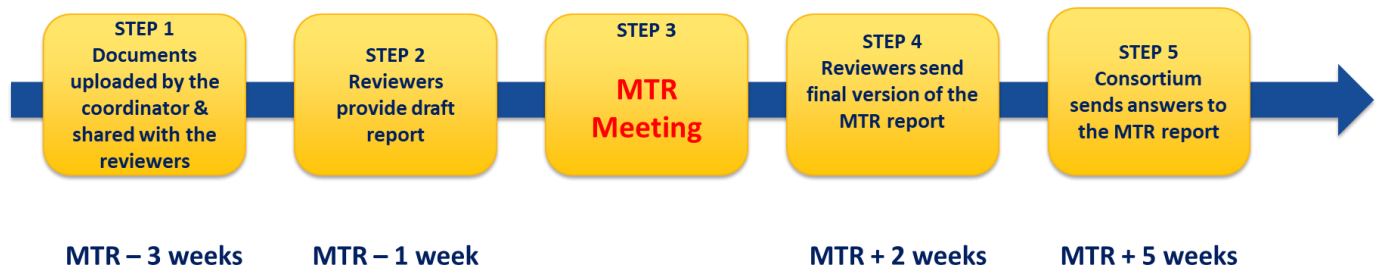
Final version of the Mid-Term Review report is sent to the coordinator of the project.

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

### *3 weeks after receipt of the Mid-Term Review report*

The consortium will send written answers to the assessment and recommendations made by the reviewers in their report.

### 3. Timeline summary



# ANNEXES

## Suggested Agenda of the Midterm Review Physical Meeting

*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**

**Opening of the meeting and people introduction - 5 -10 minutes**

### **PART 1:**

**Progress of the project – Outputs & Inputs (Presentation) – 45 minutes**

- Quick presentation of the project
- Answers to the recommendations received
- Discussion on points of clarification
- Demonstration of prototype

**BREAK – 15 minutes**

### **PART 2:**

**Discussion on the gaps between the progress made, what the project is offering and the AAL objectives: what is missing? what should be achieved in order to correct that? – 60 minutes**

**BREAK - 20 min (CMU, NCPs, and experts' internal discussion)**

### **PART 3:**

**Conclusions, recommendations, way ahead and next steps – 20 -30 minutes**

**N.B:** Time is only indicative and discussions can of course be extended if needed. Presentations should only take place in Part 1 and remain concise (timing indicated should be respected as much as possible).