

Project review guidelines

AI Call 2021 Project leader briefing webinar
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ITEA 4 is the Eureka Cluster on software innovation



Introduction

Project view

- Monitoring of running projects is done by means of Project Progress Reports (PPRs) and Project Reviews
 - A Project Review is a face-to-face project evaluation of half a day by a multidisciplinary review team
- The spirit of a review is to help and steer the project to achieve successful results and not to judge the project

Project review planning

- Planning of the reviews is done at least 6 months in advance by the ITEA Office and fixed when confirmed by the project leader (PL) and the review team
 - The planned and confirmed project reviews will be published on the Eureka Cluster Portal
 - 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

- 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 (pm & am)
 - If agreed a review can be hybrid or held fully online
- A physical review is hosted by one of the project partners
 - A city or region is proposed by the ITEA Office
 - For the final review the project consortium is asked about their preference for a specific location
 - The review team takes care of their own costs; other costs are for the project team

Project review planning

- Each project review will become a dedicated project review area on the Eureka Cluster portal.
- 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 participants

Project review team

- Review team:
 - A Chairperson (ITEA Chairwoman or ITEA Vice-chairman)
 - Two ITEA Steering Group (STG) reviewers
 - Goal is to have at least one reviewer following the project from start to end
 - A third reviewer is assigned as Spare reviewer, who can replace one of the two STG reviewers in case of unforeseen circumstances
 - When a second Cluster has been selected: A third expert assigned by the second Cluster.
 - An external expert (optional - assigned by the Public Authorities)
 - Public Authorities (PA) representative (optional)
 - A secretary (ITEA Programme coordinator)

Review participants

Project review team

- Project team:
 - Obligated:
 - Project leader; WP leaders; any key / relevant partner
 - Optional:
 - Project mentor; other project members & guests
- The project review team and project leader are published on the Eureka Cluster portal in the project review area

Community / Community calendar / Community calendar / Review #1

Review #1

22-21 February 2021, Eindhoven

Calendar Documents Attendees Actions

Attendees

No	Name	Organisation	Role	Presence
1	Loes van den Borne	ITEA Office (Netherlands)	Project Coordinator	👤📧✅
2	Johan van der Heide	ITEA Office (Netherlands)	Secretary	👤📧✅
3	Erik Rodenbach	ERaQua Services BV (Netherlands)	Chairperson	👤📧✅
4	Linda vd Borne	Sample organisation (France)	STG Reviewer	👤📧✅

[+ Select attendees from project](#) [📧 Send meeting access details to participants](#) [📄 Download attendees list \(PDF\)](#) [📄 Download signature list](#)

Review participants

Confidentiality

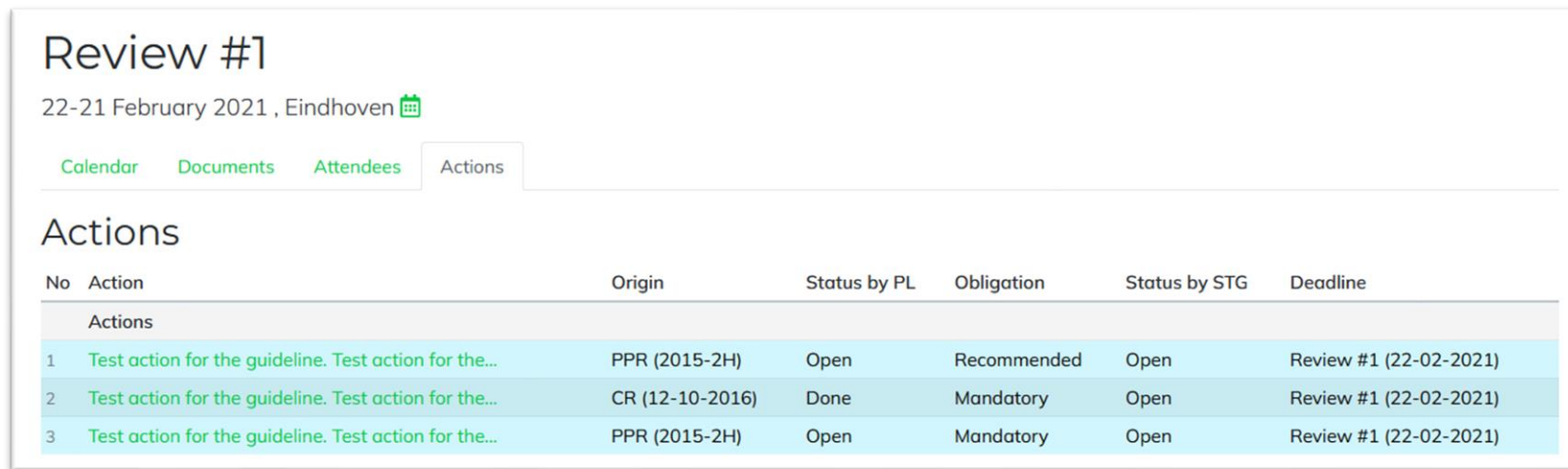
- All participants that are not members of the project consortium, i.e. ITEA and other Cluster reviewers, ITEA Office members & external experts (assigned by Public Authorities), have signed a Declaration of Non-Disclosure beforehand
- Public Authorities do not sign a DND, because they are bound to confidentiality by their labour contract
- The duly-signed DND will entitle the experts to access to all project documents that are uploaded to the Eureka Cluster portal that are needed for the review

Review preparation (1/2)

- 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, travel logistics and in case of an online review, the online communication tool used
- Submission of (document) deliverables (2 weeks before)
 - Upload your deliverables to the project Work package (WP) area (they will automatically appear in the review area)
- Provide the draft review presentations (1 week before)
 - Upload it to the project review area on the Eureka Cluster portal
 - Final presentations must be delivered latest at the start of the review

Review preparation (2/2)

- Have a review rehearsal with the project team (1 day before)
 - Invite your project mentor to the rehearsal to provide feedback
- Update the status of the open actions of previous evaluations



Review #1
22-21 February 2021, Eindhoven

Calendar Documents Attendees Actions

Actions

No	Action	Origin	Status by PL	Obligation	Status by STG	Deadline
Actions						
1	Test action for the guideline. Test action for the...	PPR (2015-2H)	Open	Recommended	Open	Review #1 (22-02-2021)
2	Test action for the guideline. Test action for the...	CR (12-10-2016)	Done	Mandatory	Open	Review #1 (22-02-2021)
3	Test action for the guideline. Test action for the...	PPR (2015-2H)	Open	Mandatory	Open	Review #1 (22-02-2021)

- Always check the latest version of the review guidelines

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 items:
 - Overview of the project
 - Overview of the market
 - Managerial topics
 - Key achievements including (optionally) demonstrations
 - Dissemination, exploitation & standardisation
 - Synthesis: consortium's conclusions
 - Reviewers' private session
 - Reviewers' feedback session
 - Final words by the Chairperson

Review meeting

Key messages (1/2)

- Overview of the project:
 - Explain the problem and your targeted solution (State-of-the-Art and the innovation)
 - Give the objectives of your project and related Key Performance Indicators (KPIs)
 - Introduce your consortium
- Overview of the market:
 - The market State-of-the-Art including:
 - the market value chain (main stakeholders)
 - the main competitors
 - The market innovation of your solution (joint solution, new business model,...)
 - The business impact of your solution: niche market or disruption, new value chain,...

Review meeting

Key messages (2/2)

- Key results (outcomes) including (optionally) demonstrations
 - We are not interested in the steps that you took, but what are the results
 - Explain the Technical State-of-the-Art in your domain (public deliverable)
 - Explain the technical innovation of your results
 - Provide KPIs showing how good your solution is:
 - A KPI has three values (initial, current and target)
- Dissemination, exploitation & standardisation
 - Exploitation means what you will finally bring individually and jointly to your markets
 - Products, services, ..
- Dissemination means how do you approach potential customers or stakeholders
 - Commercial fairs, conferences, social media, publications, ...



ITEA4

<https://itea4.org>

ITEA is the Eureka Cluster on software innovation

Σ eureka

<https://www.eurekanetwork.org>

Thank you