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BHL-Europe

Project management portal including agreed quality assurance procedures

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¹ OJ L 79, 24.3.2005, p. 1.

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0 Document History

0.1 Contributors

Person	Partner
Henning Scholz	MfN

0.2 Revision History

Revision Date	Author	Version	Change Reference & Summary
26 July 2009	Henning Scholz	0.1	Initial draft of QA procedures
10 August 2009	Henning Scholz	1.0	Final version of QA procedures approved by PSG
7 December 2010	Henning Scholz	1.1	Revised version of QA procedure
23 April 2011	Henning Scholz	1.2	Revised version of WQ procedure

0.3 Distribution

This document has been distributed to:

Group	Date of issue	Version
BHL-Europe consortia	26 July 2009	0.1
BHL-Europe consortia	20 August 2009	1.0
BHL-Europe PMG	7 December 2010	1.1
BHL-Europe consortium	28 April 2011	1.2

1 Purpose

This document is to specify the Quality Assurance procedures of BHL-Europe. These procedures will complement the QA procedures explained in Annex 1 of the Grant Agreement.

2 Background

Project Server 2007 is set up to facilitate planning and monitoring of the work plan. MS Project 2007 Professional is used as the software to support the project managers, which are the Work Package leaders. The Project Server is working in a PRINCE2 environment in order to follow the requirements of PRINCE2.

3 BHL-Europe project management principles

Every Work Package is a project in its own and every Work Package leader is responsible for managing it. As overlap and dependencies between individual Work Packages exist, immediate feedback and effective communication between the Work Package leaders need to take place to facilitate the management of these dependencies. Every Work Package leader is responsible for identifying Sub-Work Packages or Task leaders, if appropriate, and engage with the BHL-Europe consortium to distribute and delegate the work efficiently. After discussion with the WP leaders, the assignment of Task leaders is agreed by the PMG and the decision is communicated to the consortium with the notes of the PMG call. The Sub-Work Packages and Tasks are independently managed by the leaders and these leaders have the authority to decide on the necessary work, resources and management infrastructure to successfully finish the task. The Task leaders report back to the Work Package leader on request. Decisions and work plans within the Sub-Work Packages are always communicated in Cc to the Work Package leader and Work Package leaders. The progress and status is also discussed between the Work Package and Task leaders during the established conference calls (PMG, techgroup).

Every Work Package leader has to provide work plans for the Work Package to facilitate monitoring of the project status and progress. These work plans also integrate the work plans of existing Sub-Work Packages and Tasks. These work plans are available via the Project Server for the Work Package leaders to work with and for the BHL-Europe consortium to follow the project progress.

The Project Coordinator and Work Package 1 leader is responsible for the overall management of the project based on the work plan of every Work Package. These work plans need to be detailed enough to monitor the status and progress of every Work Package on a monthly basis. The Project Coordinator will identify monthly checkpoints (intermediate milestones) to split the six months work period between the progress reports into manageable segments. The Work Package leaders will report during the monthly BHL-Europe calls based on these checkpoints.

4 Quality Assurance procedures

4.1 Description of deliverables in the planning phase

All deliverables of each phase will be described and outlined in the planning phase. This is to specify the expectations and requirements in order to define the acceptance criteria of each deliverable in advance. The descriptions of deliverables need to be checked against contractual aspects (DoW) and approved by the PMG.

4.2 Quality log to keep track of deliverables, schedule and review process

A quality log will be kept for all deliverables to keep track of tests and reviews done by internal and external experts. This also includes deadlines for tasks.

4.3 Review of deliverables by external experts and submission guidelines

The deliverables of the project usually are reviewed by external experts. These experts are not members of the BHL-Europe consortium and provide feedback to the authors of the deliverables. Any (reasonable and necessary) costs associated with such external reviews are eligible as other specific costs. For M24 of the project D1.5, D1.6, D1.7, D2.5, D2.6, D3.7, D4.3 need an external review. For M30 of the project D1.8, D3.8, D5.9 need an external review. For M36 of the project D1.9, D1.11, D1.12, D2.9, D3.9, D5.11 need an external review. The external reviewer will receive the draft of the deliverable at the same time as the consortium. The WP leader or in case of doubt the PMG will decide on the version to be accepted if feedback of partners and external reviewer is contradictory.

Every deliverable needs to be finalised within the respective Work Package. The Work Package leader is fully responsible for managing the contributions to the deliverables, the internal and external review process and the finalisation of the documents. The Project Coordinator is setting the deadline for the submission of the final document to be approved and forwarded to the EC. The Project Coordinator is responsible for approving the document and delivering it to the EC by Email and mail.

4.4 Report and approval of work effort and tasks

Every resource has to report back to the project office on task progress once every month (activity report). Narrative status reports (status reports) are due on a quarterly basis to provide more details on the work progress. This status report also includes the documentation of risk and issues, which are then copied and managed in a Google doc risk & issue register. Templates and details of the reporting procedure are provided on the BHL Wiki¹. The monthly activity reports will be forwarded to the appropriate Work Package leader for approval. Only approved reports are considered for the official progress reports and the financial statement of BHL-Europe. Inconsistencies are discussed within the PMG and with the respective partners. The approval will be send to the BHL-Europe project office for filing.

¹ https://bhl.wikispaces.com/BHLE_WP1

4.5 Approval of work of WP leader by assigned team members

Work Package leader can not approve their own work. Therefore, appropriate team members are identified to approve the work of the five Work Package leaders of BHL-Europe, which are:

- WP1 leader approved by the EC (every 6 months)
- WP2 leader approved by WP3 leader (monthly)
- WP3 leader approved by WP2 leader (monthly)
- WP4 leader approved by G. Higley (monthly)
- WP5 leader approved by WP1 leader (monthly)

4.6 User evaluation of BHL portal in Month 15 and 30 of the project

The project work plan detailed in Annex 1 of the BHL-Europe Grant Agreement is foreseen two evaluation periods of the BHL Portal. The evaluations will be carried out in month 15 and 30 of the project to improve the portal and to adapt the portal usability and functionality to user requirements and needs.

4.7 Consortium rules

The BHL-Europe Grant Agreement and consortium agreement is the framework for the project set up and management. This also includes penalties for partners, two examples mentioned in the following. The Project Coordinator has the right to retain any payment towards a Beneficiary that is late in submitting or refuses to provide deliverables as defined in the Grant Agreement, Annex II.3 provided that the delay or refusal is attributable to the Beneficiary (Consortium Agreement 6.5). In case a Beneficiary has not provided the Project Coordinator with its deliverables or has provided them late or provided non-compliant deliverables, the Project Coordinator has the right to retain any payment and such Beneficiary shall not receive its concerned contribution allocation until it remedies such non-delivery, late delivery or non-compliant delivery, unless the Project Steering Group decides otherwise (Consortium Agreement 7.3).

The progress reports are explicitly mentioned as deliverables for BHL-Europe (Grant Agreement, Annex II.3). As every progress report is the summary and compilation of all activity and status reports of our partners, these monthly and quarterly reports mentioned in section 4.4 above are part of that deliverable. The above wording, which is taken from the BHL-Europe Consortium Agreement, thus applies also to the activity and status reports. In case a Beneficiary has not provided the Project Coordinator with its activity and status report or has provided them late or provided non-compliant reports, the Project Coordinator has the right to retain any payment and such Beneficiary shall not receive its concerned contribution allocation until it remedies such non-delivery, late delivery or non-compliant delivery, unless the Project Steering Group decides otherwise.