

# Work plans in proposals

Description of work, project planning, management methods and bodies, risks



# Work plan overview

- Work plans describe more than just the work that will be done.
  - Who will do it
  - What the results will be and in what form
  - Management approach to the work
  - Bodies involved
  - Timeline and amount of effort applied

# Work plan overview

- Work plans break work into thematic groups or similar activities (usually called work packages)
- Work packages have more specific tasks within them
- Work packages and tasks have responsible persons, participants, and effort assigned to them
- Effort is usually specified in terms Person Months (PMs)

# Work packages

- Work packages should have some interaction with other work packages
  - At the very least taking input and providing output
  - There should be progression of work within and between WPs
  - Not all work packages (or their subtasks) need last throughout full duration of the project
  - Work package output is usually proven in the form of a **deliverable**
- Deliverables take many forms – usually some type of report though (can be software, specifications, etc.).



# Objectives to work plan (make a link)

## Objectives

- Your objectives should be feasible goals that can be linked to both key performance indicators (KPIs) and WPs.
- Make sure to link these things
- KPIs allow you to assess your work towards objectives

## Work plan

- Describe the specific tasks needed to reach your objectives
- Divide the work into logical groups and provide a logical flow towards reaching your objectives
- Should have measurable (or lead to measurable) impacts

*Always have a plan to measure impacts!*

# Reporting



# Deliverables (and reporting)

- Deliverables (and annual reports) are how you prove you have done what you said you would do
- Are reviewed by project managers at the funding agency AND external reviewers
- Take many forms, but are usually accompanied by some report
- Take a lot of time to prepare well!
- Consider that you should have 2+ per work package. Try not to have have many deliverables due at the same time
- Are often used to demonstrate reaching **Milestones**

**T2.3 Initial ecosystems architecture** [M4-M9] [M22-M24] (Lead: [REDACTED]; Participants: technology and platform providers, pilot coordinators)

This task will design and specify all the elements of the overall **Pharaon** ecosystem functional architecture considering all the relevant use case scenarios and user and technical requirements, defined in the previous tasks. The design of the architecture will specifically target the aspects of scalability and extensibility in order to provide architectural flexibility for integration of the various solutions and components (both hardware and software) provided by the consortium partners and also for possible future external contributions and extensions (e.g. coming from the foreseen Open Calls planned in the project work plan). Therefore, special attention will be put on design of transparent interfaces between the architectural blocks and **Pharaon** message and protocol formats. The architecture principles delivered in this task will be a major reference for the following implementation and integration WPs.

### **Deliverables**

**D2.1 User and pilot requirements** [M6] (Responsible: [REDACTED]; Type: R, CO) This document will describe the organisational and technological requirements that the final solution for each pilot has to fulfil

**D2.2 Pharaon initial ecosystems architecture** [M8] (Responsible: [REDACTED]; Type: R, CO) Initial release of the **Pharaon** ecosystem architecture

**D2.3 Update of requirements and architecture** [M24] (Responsible: [REDACTED]; Type: R, CO) This report updates the deliverables of WP2 (D2.1 and D2.2) after the **Pharaon** ecosystem has been integrated and deployed.

# Deliverables (and reporting)

- Deliverables should have due dates and a clear scope.
- The work in the work package should naturally produce the main content of the deliverable
- In consortia-based projects, deliverables should have a responsible partner
- Should be..... As short as possible, as long as necessary.



**Groups  
Boards  
Councils**

# Organisation of managing bodies

- Consortia-based projects typically have multiple bodies to oversee the work.
- Coordinator (project leader) interfaces with the funding/oversight agency
- A core board (WP leaders + other important roles) advises the coordinator
- General assembly (1 vote per partner) is the decision-making body
- External bodies are useful too, but have limited scope (Advisory board)

# Organisation of managing bodies

Core board (Core group, or other similar names)

- Typically has a lot of operational oversight of the project.
- Hears complaints, concerns; makes preliminary suggestions/decisions that are passed to the general assembly.
- Decides on critical issues like risk mitigation or changes to the agreement between the funder and consortium (grant agreement)
- Coordinator typically manages this group.

# Organisation of managing bodies

## General assembly

- Main decision-making body
- Makes final decision on issues raised by coordinator, core board
- Can raise issues to be discussed

# Organisation of managing bodies

## Project specific bodies

- Structure of a project may make some special bodies relevant

Example: Pharaon project has 7 pilots. Each pilot is coordinated by one organization represented by an individual. Those individuals make up a pilot coordinators board.

# Organisation of managing bodies

## Other bodies within a project

- Not always groups, sometimes individual in a role
  - IPR manager
  - Dissemination manager
  - Risk manager
  - Quality manager
  - Clinical manager
  - Ethics manager
  - Data manager

# Organisation of managing bodies

## External bodies

- External advisory board (often with different names)
- Provides feedback on project work
- Consults on relevance, advances in the state of the art
- Often includes industry, academic, government representatives (depending on project scope)

# Risks



# Risk management

- All projects have risks, and it is important to assess them.
  - Identify the risk
  - Assess the magnitude of its affect on the project should it be realized (High, Medium, Low)
  - Assess the probability of its occurrence (High, Medium, Low)
  - Identify risk mitigation steps: how to prevent them, how to respond to them to minimize the
- There should probably be a task for risk management in the project...
  - (in small projects can be grouped with other administrative tasks)

# Mural activity

Building on your previous projects:

- Elaborate on the work plan elements created in previous murals
- Identify relevant boards needed to oversee the implementation of the work
- Break your work plan in to work packages with:
  - Objectives, PMs, tasks and (short) descriptions, deliverables

# Assignment: Final Step 3

Due 17h Friday 8.1.2021

Expand your concept into a first draft proposal.

- Consider the feedback from your peers, make changes.
- Transfer the sections of your concept note into the proposal template
- Expand the background and problem identification
- Refine objectives
- Expand the workplan with more detailed tasks.