

D1.2 PROJECT MANAGEMENT HANDBOOK



WeGenerate

PEOPLE-CENTRIC SUSTAINABLE NEIGHBOURHOODS



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EXECUTIVE SUMMARY

For successful project implementation, it is essential to outline its organizational structure, to establish an agile management framework that allows the tracking of progress and collection of timely feedback. Especially for a project like WeGenerate, with numerous interconnected tasks, milestones and deliverables, an effective project management is paramount. The management framework must provide clear procedures for timely decision-making, project coordination, task completion and result dissemination. Ultimately, the holistic management approach aims to ensure a smooth completion of the project to the highest standard with satisfactory achievement of all project objectives.

This project management handbook describes the roles and responsibilities of different entities within this project, constituted by the project partners. Furthermore, it lists the methods of communication, data management, task planning, and progress monitoring during the course of the project. Finally, this document also provides the link to the visual identity toolset for project dissemination activities.

INTRODUCTION

This document aims to set out the quality practices for the WeGenerate project and to provide assurance that the excellence requirements are planned and properly implemented. The goal is to have a handbook of rules, rights, responsibilities, and communication processes of the Project Coordinator (PC), General Assembly, Executive Committee (ExCom), Advisory Board (AB), and all project partners.



CONTENTS

1. Description of deliverable

The Project Management Handbook presented in this document is a part of the Task 1.1 - Project Coordination. The content of the handbook is based on the terms and conditions described in the WeGenerate Grant Agreement no. 101123546 (GA), WeGenerate Consortium Agreement (CA) and the [Horizon Europe Annotated Model Grant Agreement](#) (MGA). In the event of doubt, these original documents prevail.

The goal of this Handbook is to provide the outlook on how “WeGenerate” will be managed in order to achieve its objective. It describes the structure of the consortium as well as roles and responsibilities of different project partners. In addition, communication and meeting procedures are described, which allow for an effective flow of information between partners and exchange of knowledge between the partners involved in different work packages (WPs). Notably, this document shows the procedures established within the project for making complex decisions affecting outcome of the project, as well as the mechanisms for successful monitoring and coordination of the project.

2. Project structure and roles

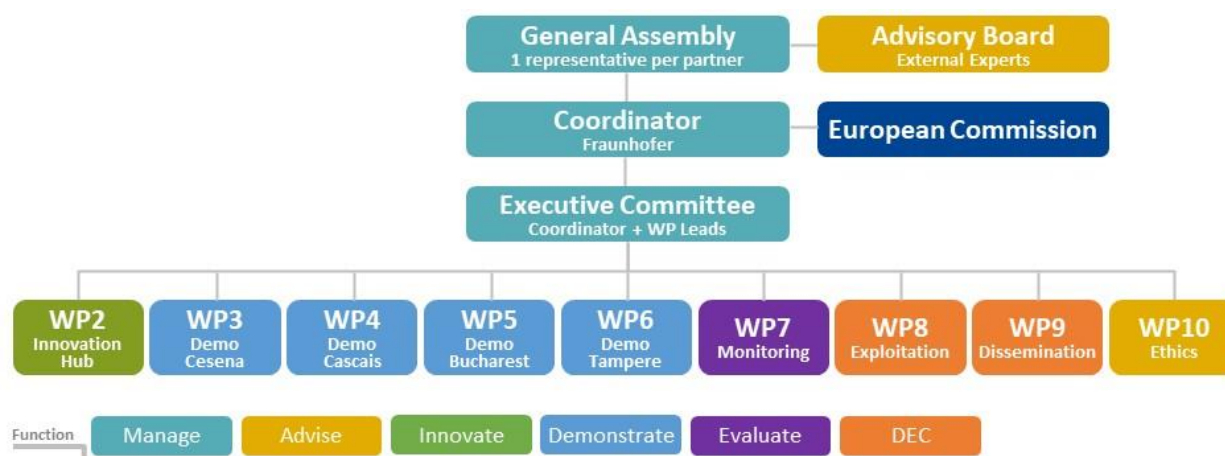
The WeGenerate consortium involves 21 partners from 9 countries as shown below (Table 1), each of them taking up various roles and responsibilities.

Table 1:

Number	Short name	Legal name	Country	Type
1	Fraunhofer	FRAUNHOFER GESELLSCHAFT ZUR FORDERUNG DER ANGEWANDTEN FORSCHUNG EV	DE	Research Institute
2	CESENA	COMUNE DI CESENA Notably, this document	IT	City
3	CASCAIS	EMAC EMPRESA MUNICIPAL DE AMBIENTE DE CASCAIS EM SA	PT	City
4	BUCHAREST	PRIMARIA SECTORULUI 2 BUCURESTI	RO	City
5	TAMPERE	TAMPEREEN KAUPUNKI	FI	City
6	ICLEI	ICLEI EUROPEAN SECRETARIAT GMBH (ICLEI EUROPASEKRETARIAT GMBH)	DE	City Network SME
7	EIT UM	EIT KIC URBAN MOBILITY SL	ES	Innovation Network
8	EUPPY	QB LDA	PT	SME
9	PARKUNLOAD	PARKUNLOAD SL	ES	SME
10	Greenvolt Com	GREENVOLT COMUNIDADES SA	PT	SME
11	ENGIE	ENGIE BUILDING SOLUTIONS SRL	RO	SME
12	LNEG	Laboratorio Nacional de Energia e Geologia I.P.	PT	Research Institute
13	UNIBO	ALMA MATER STUDIORUM - UNIVERSITA DI BOLOGNA	IT	University
14	UTCB	UNIVERSITATEA TEHNICA DE CONSTRUCTII BUCURESTI	RO	University
15	VTT	TEKNOLOGIAN TUTKIMUSKESKUS VTT OY	FI	Research Institute
16	NovaSBE	UNIVERSIDADE NOVA DE LISBOA	PT	University
17	CRES	CENTRE FOR RENEWABLE ENERGY SOURCES AND SAVING FONDATION	EL	Research Institute
18	IREC	FUNDACIO INSTITUT DE RECERCA DE L'ENERGIA DE CATALUNYA	ES	Research Institute
19	CVUT	CESKE VYSOKE UCENI TECHNICKE V PRAZE	CZ	University
20	RM3	UNIVERSITA DEGLI STUDI ROMA TRE	IT	University
21	NTNU	NORGES TEKNISK-NATURVITENSKAPELIGE UNIVERSITET NTNU	NO	University

These roles, the decision-making entities and information flow within the WeGenerate project are described in the following sections as well as illustrated in the Project Management structure below (Figure 1).

WeGenerate Project Management Structure (Figure 1):



2.1. General Assembly

The highest authority of the project, which comprises of one representative per consortium partner. General Assembly meetings will be organised once a year. The General Assembly's decision may include: initiating and approving amendments of the Grant Agreement and Consortium Agreement, define strategic reorientation of the work plan and budget, termination of participation of consortium partners, etc. The General Assembly's decisions shall require voting by simple majority.

2.2. Executive Committee (ExCom)

It is composed of the Coordinator (Chair) and the WP leaders, supported by the Project Office. The ExCom is the executive body in charge of the implementation of the project. Its responsibilities include: day-to-day decision-making, follow-up of detailed work plans,

assessment of project results, minor adaptation of further work, proposals for GA decision, risk management, and preparation of periodic project progress reports.

2.3 . Project Coordinator (PC)

The coordinator is formally entitled to manage the relationship between the consortium and the European Commission. His/her responsibilities include: chair the ExCom, report to the GA, undertake all necessary legal and ethical responsibilities and obligations, ensure sound financial management, ensure the scientific and technical coordination of the project, validate and submit reports and deliverables to the EC, and facilitate information flow within the consortium.

2.4 . Advisory Board (AB)

The WeGenerate AB consists of 3 external experts who are expected to provide feedback and advice on the strategic orientation and long-term strategy of the project. The WeGenerate AB Members include:

Advisor on Urban Transition

Christoph Gollner
Coordinator of PED Transition Pathway
Driving Urban Transitions Partnership (DUT), Austria

Advisor on Social Innovations and Ethics

Helen Sooväli-Sepping
Councillor for Rector on Sustainable Development and Green Transition
Tallinn University of Technology, Estonia

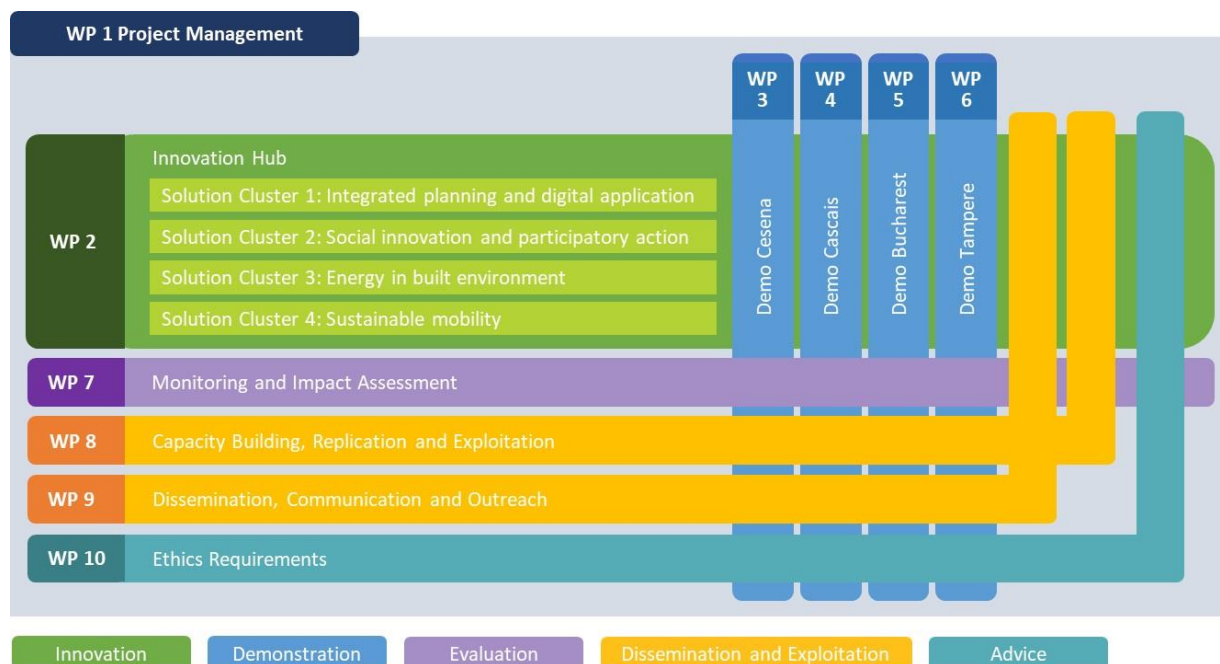
Advisor on Buildings and Cities

Koen Steemers
Professor of Sustainable Design
Department of Architecture, University of Cambridge, UK

2.5. Work Package Leaders (WPL)

As stated in the signed GA, the WeGenerate work plan is divided into 10 WPs, all of which are interconnected as illustrated in the PERT diagram below (Figure 2).

PERT diagram of the overall WeGenerate Work Package Structure (Figure 2):



Each WP is coordinated by one of the project partners, referred to as Work Package Leaders (WPLs) who are specified in the GA. The role of WPL is to coordinate the implementation of the tasks within the corresponding WP, monitor the work progress to ensure that the WP proceeds according to the time plan listed in the Gantt Chart (Figure 3), as well as to ensure the timely completion of the corresponding deliverables/milestones and successful achievement of the WP objectives. Each WPL is expected to have a transparent communication with other project partners and inform the PC about the WP progress on a regular basis.

Figure 3:

Event		2023		2024												2025												2026												2027																																	
		11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12																						
WP / Task name		YEAR 1												YEAR 2												YEAR 3												YEAR 4																																			
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48																								
WP1	Project Management	MS1																																				MS12																																			
T1.1	Project Coordination	D1.1 / D1.2												D1.5												D1.6																																															
T1.2	Project Meeting Organisation																																																																								
T1.3	Quality Assurance	D1.3																																																																							
T1.4	Data Management Strategy, GDPR and Ethical Policies	D1.4																																																																							
WP2	Innovation Hub													MS6-MS9																								MS12																																			
T2.1	Solution Cluster – Integrated Planning and Digital Application																																					D2.2																																			
T2.2	Solution Cluster – Social Innovation and Participatory Action	D2.1																																				D2.2																																			
T2.3	Solution Cluster – Energy in Built Environment																																					D2.2																																			
T2.4	Solution Cluster – Sustainable Mobility																																					D2.2																																			
WP3	Demo: Re-activating Urban Space from City Gateway to Neighbourhood (Cesena)													MS5		MS6												MS10												MS12/MS14																																	
T3.1	Coordination of the Local circle																																																																								
T3.2	Development of Urban WeGeneration Action Plan and Implementation Roadmap													D3.1																																																											
T3.3	Implementation of Intervention Actions																																					Post-implementation monitoring period																																			
T3.4	Storytelling of Urban WeGeneration Pathway and Development of a Long-Term Sustainability Plan																																																	D3.2		D3.3																					
WP4	Demo: Social Inclusive Decarbonisation (Casals)													MS5		MS7												MS10												MS12/MS15																																	
T4.1	Coordination of the Local circle																																																																								
T4.2	Development of Urban WeGeneration Action Plan and Implementation Roadmap													D4.1																																																											
T4.3	Implementation of Intervention Actions																																					Post-implementation monitoring period																																			
T4.4	Storytelling of Urban WeGeneration Pathway and Development of a Long-Term Sustainability Plan																																																	D4.2		D4.3																					
WP5	Demo: Open Campus for People and Climate (Buchenart)													MS5		MS8												MS10												MS12/MS16																																	
T5.1	Coordination of the Local circle																																																																								
T5.2	Development of Urban WeGeneration Action Plan and Implementation Roadmap													D5.1																																																											
T5.3	Implementation of Intervention Actions																																					Post-implementation monitoring period																																			
T5.4	Storytelling of Urban WeGeneration Pathway and Development of a Long-Term Sustainability Plan																																																	D5.2		D5.3																					
WP6	Demo: Open Campus for People and Climate (Tampore)													MS5		MS9												MS10												MS12/MS17																																	
T6.1	Coordination of the Local circle																																																																								
T6.2	Development of Urban WeGeneration Action Plan and Implementation Roadmap													D6.1																																																											
T6.3	Implementation of Intervention Actions																																					Post-implementation monitoring period																																			
T6.4	Storytelling of Urban WeGeneration Pathway and Development of a Long-Term Sustainability Plan																																																	D6.2		D6.3																					
WP7	Monitoring and Impact Assessment	MS4												MS5												MS10												MS12																																			
T7.1	Development of the WeGenerate Impact Model													D7.1																																																											
T7.2	Development and Implementation of a Standardised Data Measurement and Processing Protocol	D7.2																																																D7.4																							
T7.3	Overall Project and Cross Demo Impact Assessment													D7.3																																				D7.5																							
WP8	Capacity Building, Replication and Exploitation	MS3																																				MS11												MS12																							
T8.1	Follower City Liaison Groups																																																																								
T8.2	Training, Capacity Building and Knowledge Exchange																																																																								
T8.3	Replication Roadmaps and Coaching of the Follower Cities																																																	D8.1																							
T8.4	Transferability of Results and Urban WeGeneration Guidance Package																																																	D8.3																							
T8.5	Market Analysis and Exploitation Strategy																																																	D8.2																							
WP9	Dissemination, Communication and Outreach	MS2																																																																							
T9.1	Dissemination and Communication Strategy													D9.2.1												D9.2.2												D9.2.3												D9.2.4																							
T9.2	Communication Toolkit	D9.1																																																																							
T9.3	Supporting Local and National Communication																																																																								
T9.4	Events and Platforms																																																																								
T9.5	Thematic Case Studies and Policy Recommendations																																																													D9.3/D9.4											
WP10	Policy Recommendations																																																																								
WP11	Policy Recommendations Assistance													D10.1																																																											

(The original excel file is also available on TEAMS for a more detailed view and can be found as follows: Documents>General>03 Events)

The WPLs are also in charge of organizing the regular WP Meetings, setting the meeting agenda, moderating it and facilitating the exchange of knowledge for the completion of tasks. Furthermore, the WPLs are expected to attend the monthly online consortium meetings to update the PC on the status of the WPs so as to allow timely detection of potential problems and to follow closely the project activities in order to facilitate cross-WPs exchanges.

2.6. Task Leaders (TLs)

The work of each WP is divided into different tasks and each task is led by a Task Leader (TL, cf. Work Breakdown Structure in Annex 4.1 (FACTRO)). TLs are responsible for coordinating the implementation of the work planned in the corresponding task. The TLs should

communicate with the WPL about the progress of their corresponding tasks and provide inputs to WP activities and reporting when requested by the WPLs or PC.

3. Internal Management Procedures

Procedures implemented to ensure proper implementation of the project and allowing a timely reaction to potential problems arising in the course of the project are described below.

3.1. Collaboration tool, communication and project management software

Core documents for the project are shared in the WeGenerate Team on the Microsoft Teams platform. All partners involved in the project are granted access to the WeGenerate Team. upon request, new project members can be added to the WeGenerate Team by the PC or the administrative assistant of the PC. All data managed within the MS Teams platform complies with the data protection, storage, and management protocols of Fraunhofer Institute of Solar Energy Systems (ISE).

In order to reach all members of the consortium via e-mail, an e-mail distribution list has been set up.

Upon request, new recipients can be added to these list by the PC or the administrative assistant of the PC. Recipients can unsubscribe from the lists upon request to the PC / administrative assistant of the PC.

Additionally, a live contact list with primary contacts at each participating institution can be found in the WeGenerate Team:

Dokumente > General > 01_Administration

For project management the cloud-based project management software FACTRO is employed. Upon request, new users can be added by the PC / administrative assistant of the PC.

3.2. Decision making

It is expected that due to the collaborative nature of the project, disputes between individual parties can be settled by consensus after discussion among the conflicting parties. The PC can take a mediating role and assist conflicting parties in settling their dispute if needed. However, if the conflict cannot be resolved in this way, the partners can ask the PC to organize an extraordinary General Assembly meeting upon written request. Within this meeting, the dispute will be discussed, and agreement will be sought by dialogue and mutual concession. If this does not resolve the dispute, the General Assembly will vote and make a final decision.

3.3. Project monitoring and reporting

Deliverables and internal review process

The WeGenerate work plan is structured into 10 WPs and their corresponding tasks. In the GA and DoA, deliverables and milestones attributed to the corresponding WPs are detailed and will not be repeated here.

The quality assessment methodology is explained in detail in the Quality Assurance Plan D1.3 (2.1. Main Principles and 2.2. Internal Review Process)

Periodic Reporting to European Commission

Two periodic reports and one final report are planned to be submitted in the framework of the WeGenerate project.

The three reporting periods are indicated in the GA as:

- RP1: from month 1 to month 18
- RP2: from month 19 to month 36
- RP3: from month 37 to month 48

The final submission of these reports as foreseen in the Grant Agreement is no later than 60 days after the end of each reporting period. Internal review deadlines will depend on the date of the review meetings.

The DoA contains a list of risks already identified in the proposal phase of this project. During implementation of the project, risks will be assessed and monitored continuously

3.4. Dissemination

Please see article 17 of the Grant Agreement: Unless otherwise agreed with the granting authority, the beneficiaries must promote the action and its results by providing targeted information to multiple audiences (including the media and the public), in accordance with Annex 1 and in a strategic, coherent and effective manner.

Before engaging in a communication or dissemination activity expected to have a major media impact, the beneficiaries must inform the granting authority.

Open data management

In compliance with requirements of the Horizon Europe programme, a Data Management Plan will be set up and delivered as Deliverable D1.4 of the project.

Visual Identity

To maintain a consistent image of the WeGenerate project, a communication toolset has been created and shared in the WeGenerate Team WP9 folder:

[Dokumente](#) > [General](#) > [02_WP](#) > [09_WP9 Dissemination, Communication and Outreach](#) > [T9.2 Communication Toolset](#) > [Project Templates](#)

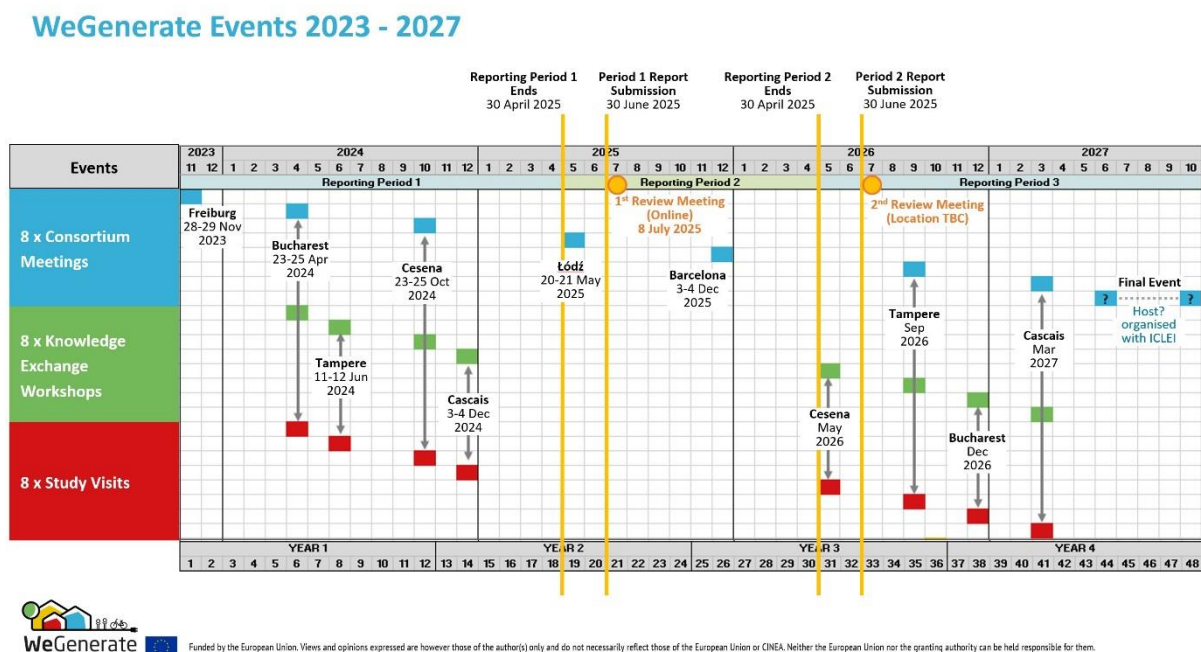
The toolset contains the WeGenerate logos, color palette, background images, flyers and document templates. The partners are expected follow the WeGenerate visual identity in their dissemination activities.

3.5. Project meetings

The WeGenerate project strives for a frequent exchange between the partners. In order to establish effective collaboration and to keep track of the overall project progress, the consortium is meeting monthly online. The meetings are organised by the PC and all project partners are invited to attend.

It is foreseen that a number of in-person events will take place during the course of the project. Figure 4 shows a tentative plan of the events, the arrangement seeks to combine different activities in each in-person meeting in order to optimise the use of resources and reduce the carbon footprint of the project.

Figure 4: WeGenerate Event Plan 2023-2027



Annexes

4.1. Work Breakdown Structure (FACTRO Project Management Tool)



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PARTNERS LOGOS



CASCAIS



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