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**Life SMART**  
Support small Municipalities towArds Energy Transition  
(LIFE22-CET-SMART)

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# lifeSMART

Support small Municipalities towARds energy Transition



## D1.1: Management Plan

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### SMART Project Profile

Project ID:	101120908
Acronym:	LIFE22-CET-SMART
Title:	Support small Municipalities towArds Energy Transition
Start Date:	01/10/2023
Duration:	30 Months



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## 1 Executive Summary

This document outlines the primary regulations, conventions, and strategies that partners should employ for coordinating inter-project activities and managing structures and procedures within the SMART project. It serves as a guiding framework for project partners in overseeing, controlling, and executing all administrative and financial aspects, ensuring alignment with the project's schedule, resources, and plan. The document includes essential tools such as a Gantt chart and a Work Breakdown Structure (WBS), along with details like schedules, designated partners for each task, associated deliverables, and dependencies on other tasks.

The document has the following objectives:

- Ensuring accurate execution of the project's work plan, adaptable to changing needs.
- Coordinating all activities comprehensively among project partners.
- Steering the project implementation smoothly and collaboratively, involving both the partnership and external stakeholders.
- Facilitating timely reporting to the European Commission and managing the project's administrative and financial aspects.

Furthermore, the report outlines the approach to project monitoring, supervision, reporting, and review. It establishes procedures for periodic reporting on activities and expenditure, applicable to all partners for providing data to the Project Coordinator (PC) and preparing management and financial reports. Instruments are developed to monitor the progress of activities and anticipated deliverables. The document also covers key provisions in the Consortium and Grant Agreements, offering insights into the consortium's organizational structure, decision-making procedures, roles, and responsibilities.



## 2 Management structure

The primary objective of project management is to guarantee the successful implementation of the project in accordance with its goals. To accomplish this, the project's consortium will carry out all necessary management and supportive activities to ensure the delivery of high-quality outcomes within the predetermined project timeline and budget. Collaborative projects like SMART involve a significant number of participating partners and possess high technical and organizational complexity. This section further refines and details the advanced SMART management structure.

### 2.1 Management Structure Overview – Roles and Responsibilities

The organizational structure is characterized by the following constitutional elements:

- Project Officer (PO)
- Project Manager (PM)
- Team Manager (TM)
- Financial Manager (FM)
- Steering Committee (SC)
- Technical Board (TB)
- Work Package & Task Leaders

#### 2.1.1 Project Officer

The main role for Project Officer (PO) is to manage the Grants on CINEA's side, for the evaluation, monitoring, and financial evaluation of the projects. This includes monitoring and control of the official deliverables submitted through the Participant portal, including the Project Periodic Reporting at M15.

PO communicates with the Project Manager, who acts as intermediary between the consortium partners and the Commission, acting as the Central Contact Point for the project. PO also participates in the Kick-Off meeting and the final project meeting. Main responsibilities include the management of:

- Objectives versus Achievements.
- Management and Collaboration Status.
- Financial Aspects.
- Exploitation and Dissemination of Results.
- Monitor fulfilment of contractual obligations
- Via deliverables, periodic reports, on-site reviews, etc.
- Check financial statements.

#### 2.1.2 Project Manager

The coordinator will appoint a Project Manager (PM), which will be the only contact with CINEA,



and will be responsible and will be responsible for the administrative and financial management and reporting of the project, as well as of the relations with the partners.

### **2.1.3 Team Manager**

Each beneficiary will appoint a Team manager (TM) responsible for the implementation of the various tasks in the related target area, as well as for the communication with task and WP leaders, to which TM is required to report about progress and problems if any. They will coordinate the activities at partner level and ensure the quality and time compliance of the foreseen deliverables and tasks. Three of them (AREANATEJO, CMRC and CCI NCA) will act as leaders of the technical WPs; under this role, they will be responsible of coordinating and harmonizing the work of the Task leaders and of the other partners to ensure the timely implementation of activities and deliverables outputs pertaining to their WP, as well as the achievement of the foreseen Milestones. Additionally, each TM will transfer method and tools agreed by the TB to the rest of local SMART team, that besides the beneficiaries' staff, includes the members of IMTS, i.e the representatives of the municipalities involved, and the experts engaged in each target areas.

### **2.1.4 Financial Manager**

Each beneficiary will appoint a Financial Manager (FM) who will be reporting to the coordinator's Financial Manager pointing out any problems that might arise regarding expenditures progress, financial reporting, and budget issues in general.

### **2.1.5 Steering Committee (SC)**

The Steering Committee (SC), is in charge of major decisions within the project, composed of the PM and the TMs. The SC will define the intervention strategies, plan actions, and evaluate results, coordinate the contributions and activities of all partners, optimize time and resources, and approve any necessary adjustments during the course of the work.

### **2.1.6 Technical Board (TB)**

The Technical Board will be formed by the PM and the TMs with the participation of the technicians that will be involved in each task. It will act as operational coordinator of project activities, keeping track of the progress of project tasks, identifying any problems encountered during their execution and propose corrective actions.

### **2.1.7 Work Package & Task Leaders**

Work Package and Task Leaders are contractual partners responsible for a work package or a task respectively. Their role involves the planning and execution of activities within their designated work packages or tasks, aligning with the overall work plan. While they can delegate certain sub-tasks to partners, they retain ultimate responsibility for the entire work package or task. Work Package and Task Leaders also play a crucial role in providing overarching guidelines, coordinating with other work packages or tasks, and ensuring timely



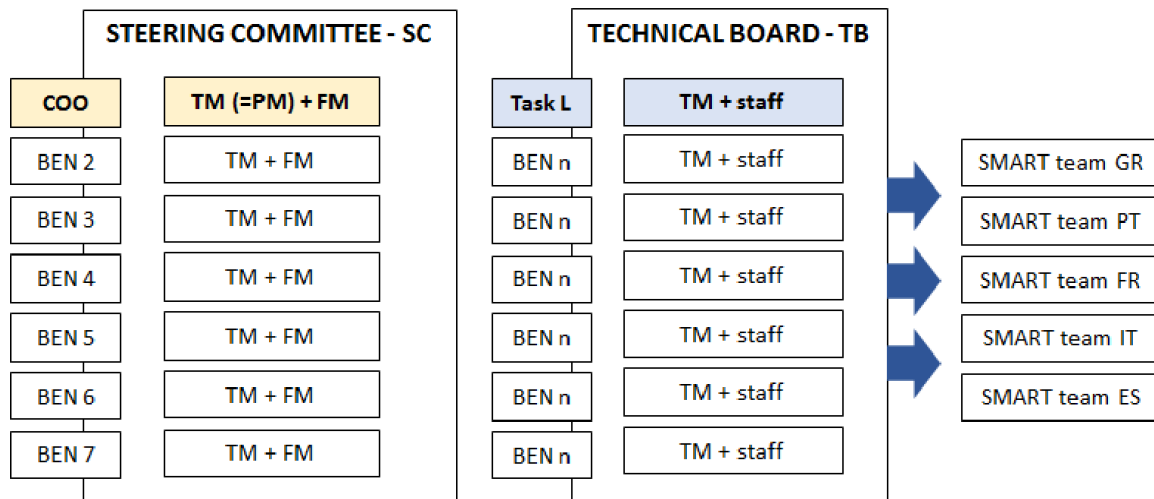
delivery of results needed for subsequent tasks in other work packages.

Additionally, they are accountable for regular reporting on work progress to both the Technical Coordination Team and the General Assembly. In instances of significant developments that may impact the overall work plan or difficulties in task execution, prompt communication with the Technical Coordinator is essential. Discussions with the Technical Coordinator focus on procedural and strategic matters to collaboratively make decisions aligned with the project's objectives. The Advisory Committee (AC) may offer support in the decision-making process if deemed necessary. Work Package Leaders (WPLs) are also expected to conduct monthly call conferences with corresponding task leaders to monitor technical task progress effectively.

The Work Package and Task appointment can be summarized in the table below:

Work package		Tasks	Task leader
Wp1 Project Management and coordination	COO1-Anatoliki	T1.1 Amministrative and financial management	COO 1-Anatoliki
		T1.2 Technical coordination	COO 1-Anatoliki
		T1.3 Monitoring and assessment	COO 1-Anatoliki
Wp2 Capacity building	BEN2-AREANATEjo	T2.1 Activation of inter-municipal technical structures (IMTS)	BEN2-AREANATEjo
		T2.2 Best practices analysis	BEN2-AREANATEjo
		T2.3 Advanced training	BEN7-CRAS
		T2.4 Energy literacy	BEN6-US
Wp3 IMTs at work	BEN3-CCI_NCA	T3.1 Database construction	BEN6-US
		T3.2 Plans alignment and updating	BEN7-CRAS
		T3.3 Strategy definition	BEN3-CCI_NCA
		T3.4 Implementation of local initiatives	BEN3-CCI_NCA
Wp4 Sustainability, replication and exploitation of project results	BEN4-CMCR	T4.1 Consolidation of the IMTSs	BEN4-CMCR
		T4.2 Consolidation of training programmes	BEN7-CRAS
		T4.3 Multilevel Governance	BEN5-FAMP
		T4.4 Communication and dissemination pack	BEN6-US
		T4.5 Networking	COO 1-Anatoliki

While the management structure can be summarized in the following figure:



This structure is completed by a Communication Manager (CM), appointed by BEN6-US as task leader of T.4.4, who will coordinate project communication activities and harmonize the partners' actions in this field.

Decision-making will be jointly performed by all partners within the Steering Committee, which will meet periodically to examine the project status and take decisions by simple majority. The PM will prepare minutes/reports of each meeting and share them with the partners within 1 week after the meeting and ensure the follow-up of the SC decisions through monthly checks.

### 3 Project meetings

Communication within the Consortium will be carried out mainly through emails and videoconferences. To facilitate internal communication and allow for the synchronization of work, the PM will use free web tools to collect and share documents (e.g. Google Drive), and collaborative work platforms. The PM will be in regular communication with the other partners, giving instructions and assistance, making sure that partners deliver project deliverables and reporting documents in due time, also by sending e-mail reminders with adequate advance notice before each deadline. The PM will regularly interact and collaborate with the Financial Manager, the Monitoring Manager, the Communication Manager and the WP leaders, in order to keep track of the partners' performance and achievements.

To ensure good quality, monitoring, planning and control of project implementation, the following mechanisms will be set up:

- A Project Management Plan (the present document) drafted by the PM at the beginning of the project and approved by the SC) will detail activities, procedures, tasks, and responsibilities, and include indicators and templates to be used by partners for monitoring and reporting. It will be reviewed each year and updated if necessary. The Plan will also include a Monitoring and quality assessment section and a Risk Management section.
- Periodic checks of project progress (both technical and financial) through a) quarterly physical and online meetings of both the SC and the TB (at least a physical one a year) summoned by



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the PM, aimed to identify delays and problems, define corrective measures when needed, and take decisions on budget issues; b) additional meetings, organized when needed, or in critical phases of the project. Moreover, the PM will be in constant communication with the WP leaders, who will refer to him/her for any issue or delay that may occur and agree with him/her upon any corrective measure to be undertaken. The PC will consult with the SC in case unexpected problems or delays affect the project implementation, to take the necessary measures and readjust the timetable accordingly.

- Internal check of the quality of project deliverables, carried out by the Technical Board according to common procedures and criteria described in the abovementioned Project Management Plan. The TB will report any criticalities to the SC.



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## 4 Budget

All project participants are required to monitor their contributions, and each beneficiary must ensure that timekeeping aligns with EC regulations. The project coordinator has the authority to request information on time allocation for each project Work Package from partners at any point, facilitating project monitoring and resource expenditure evaluation against the plan.

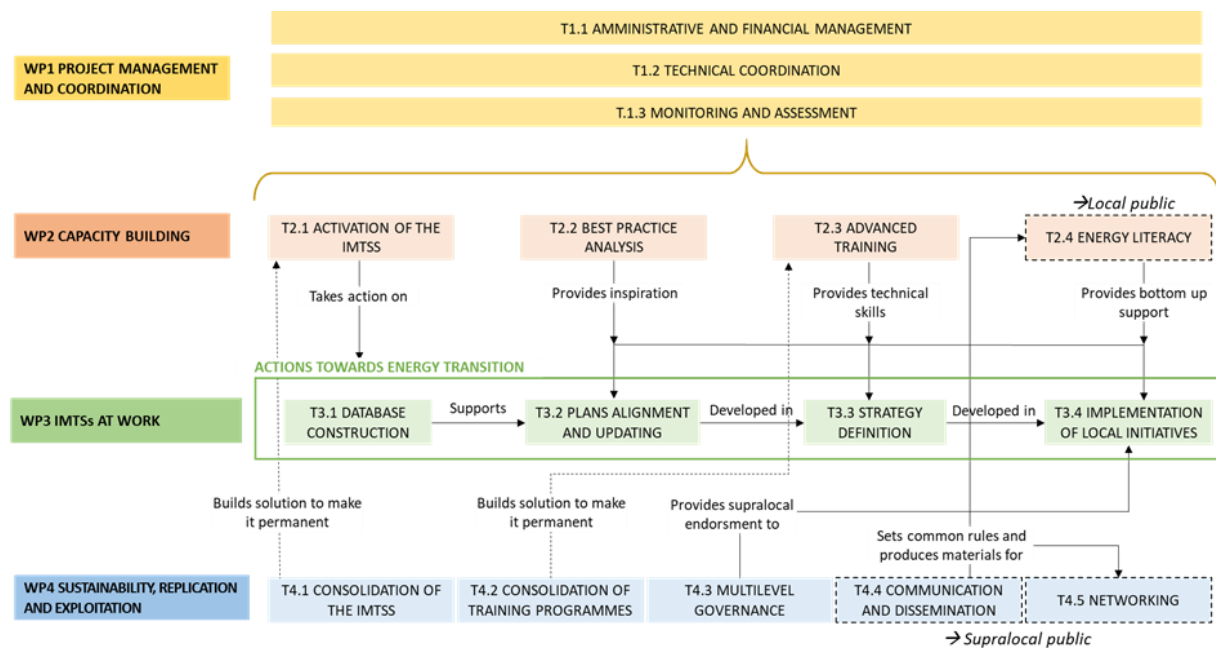
If significant deviations in project progress or resource utilization by partners arise, the Steering Committee may engage in discussions regarding resource reallocation. Should the Steering Committee opt to amend the budget, negotiation with CINEA falls under the responsibility of the Project Coordinator.



## 5 Work plan

The SMART Project objectives will be pursued by the consortium, utilizing a detailed work plan outlined in this section. This plan comprises four Work Packages (WPs) and extends over a duration of 30 months. Multiple consortium partners are involved in each WP, pursuing a highly collaborative approach, thus ensuring an optimal blend of technical competence, while at the same time enhancing the likelihood of accomplishing the project objectives successfully and within the specified timeframe.

The project's work plan can be graphically represented in the following figure:



### 5.1 Tasks breakdown

The project's Tasks along with information on each task's Leader and starting/ending month is shown in the table below:

Table xx. Tasks list

Task n°	Task Title	Task Leader	Start Month	End month
Task 1.1	Administrative and financial management	ANATOLIKI	M1	M30
Task 1.2	Technical coordination	ANATOLIKI	M1	M30
Task 1.3	Monitoring and assessment	ANATOLIKI	M1	M30
Task 2.1	Activation of inter-municipal technical structures	AREANATEJO	M1	M6



Task n°	Task Title	Task Leader	Start Month	End month
Task 2.2	Getting inspired by best practices	AREANATEJO	M1	M6
Task 2.3	Advanced training	CRAS	M7	M18
Task 2.4	Energy literacy	U-SPACE	M13	M24
Task 3.1	Database construction	U-SPACE	M7	M15
Task 3.2	Plans alignment and updating	CRAS	M13	M21
Task 3.3	Strategy definition	CCI_NCA	M19	M27
Task 3.4	Preparation for the implementation of local initiatives	CCI_NCA	M22	M30
Task 4.1	IMTSs consolidation	CMCR	M25	M30
Task 4.2	Training programmes consolidation	CRAS	M25	M30
Task 4.3	Multilevel governance	CMCR	M25	M30
Task 4.4	Communication and dissemination	CMCR	M4	M30
Task 4.5	Networking	ANATOLIKI	M19	M30

## 5.2 Gantt Chart

The Gantt Chart below summarizes all the crucial information regarding the project's implementation. It consists of the task interdependencies, the timeline of WPs and Tasks duration as well as the Deliverables and Milestones deadlines.



QUARTERS	YEAR 1				YEAR 2				YEAR 3			
	Oct-Dec 23	Jan-Mar 24	Apr-Jun 24	Jul-Sep24	Ott-Dec 24	Jan-Mar 25	Apr-Jun 25	Jul-Sep25	Ott-Dec 25	Jan-Mar 26	Apr-Jun 26	Jul-Sep26
	1-3	4-6	7-9	10-12	13-15	16-18	19-21	22-24	25-27	28-30	31-33	34-36
WP (WP Leader) /TASK (Task Leader)												
<b>WP1 - Project Management and coordination (WPL=Anatoliki)</b>												
Task 1.1 - Administrative and financial management (TL=Anatoliki)	D1.1		D1.2 D1.3									
Task 1.2 - Technical coordination (TL=Anatholiki)	MS1 (KoM)				(3 <sup>rd</sup> E)				(4 <sup>th</sup> E)			
Task 1.3 - Monitoring and assessment (TL=Anatoliki)			D1.4							D1.5		
<b>WP2 - Capacity building (WPL=Areanatejo)</b>												
Task 2.1 - Activation of inter-municipal technical structures (TL =Areanatejo)		#MS2										
Task 2.2 – Getting inspired by best practices (TL=Areanatejo)		MS3 (2 <sup>nd</sup> E)										
Task 2.3 - Advanced training (TL=Cras)						D2.1*						
Task 2.4 - Energy literacy (TL=US)								D2.2				
<b>WP3 – IMTSs at work (WPL=CCI_NCA)</b>												
Task 3.1 - Database construction (TL=US)					D3.1							
Task 3.2 - Plans alignment and updating (TL=Cras)							D3.2					
Task 3.3 - Strategy definition (TL=CCI_NCA)									D3.3			





## 6 Reporting

During the implementation of the SMART Project, four types of reporting shall apply to all consortium members:

- Ongoing communication with the EC will involve the submission of deliverables through the Project Coordinator, with official documents being in PDF format.
- Continuous reporting to the EC which will include Administrative and Financial Reports submitted to the Project Coordinator for progress evaluation. These reports will serve as the foundation for EC communications, including the creation of annual reports.
- Internal reporting will encompass the completion of Technical Progress/Status Reports by WP Leaders. These reports will be communicated to the Project Coordinator, distributed to all participants, and uploaded to the project's private area. They will serve as the basis for WP meetings, updating all members on progress, work plan adjustments, and accomplishments, aiding in planning and facilitating risk management.
- Public deliverables and other project-generated documents intended for external audiences, such as other European projects and potential users, will be crafted to effectively communicate project developments.

### 6.1 Continuous Reporting

The beneficiaries must continuously report on the progress of the action (e.g. deliverables, milestones, outputs/outcomes, critical risks, indicators, etc; if any), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

Standardized deliverables (e.g. progress reports not linked to payments, reports on cumulative expenditure, special reports, etc.; if any) must be submitted using the templates published on the Portal.

### 6.2 Periodic Reporting: Technical Reports and Financial Statements

The SMART project comprises two Reporting Periods (RP) (as specified in the Grant Agreement). On that basis, the project will deliver two periodic reports:

1<sup>st</sup> periodic report (M1 to M15)

2<sup>nd</sup> periodic report (M16 to M30) as described in the Grant Agreement and illustrated in the table below:



Reporting				
Reporting periods			Type	Deadline
RP No	Month from	Month to		
1	1	15	Additional prefinancing report	60 days after end of reporting period
2	16	30	Periodic report	60 days after end of reporting period

These periodic reports include the production of a technical and financial report, including the requests for payment.

The technical part includes an overview of the action implementation and must be prepared using the template available in the Portal Periodic Reporting Tool. It will contain:

- Explanation of the work carried out by the beneficiaries. The report must be of adequate technical quality as it will be the main description of project progress to the EC. Elaboration is led by the Project Coordination with the active contribution of the WP Leaders and collaboration from all the partners in general.
- Overview of the progress of work towards the objectives of the action, including milestones and deliverables, including explanations justifying any divergence from work expected to be carried out in accordance with the Work Plan, and that actually carried out.

The financial part includes:

- The financial statements (both individual and consolidated for all beneficiaries and affiliated entities)
- The solid explanation for the use of resources from each beneficiary

Cost statements are the sole responsibility of each partner.

### 6.3 Internal reporting

To ensure effective project management, project progress will be internally reported every six months. The Project Coordinator will supply templates, which WP Leaders will complete with input from Task Leaders and contributors to WP activities. These completed templates will be submitted to the Project Coordinator in a timely manner. Regarding financial and budget matters, each beneficiary will conduct cost monitoring every six months, producing reports on incurred costs and resource utilization (Person Months) per WP. These reports will be sent to the Project Coordinator, aligning with EC cost declarations.

All templates will be accessible to partners in the shared Google Drive folder dedicated to the project. Updates to templates and associated details can be implemented as necessary throughout the project duration.



## 7 Risks identification and contingency planning

Proactive measures for risk management and contingency planning are integral to the project. The implementation follows the SMART risk analysis and management process, which adheres to the FERMA Standard. In this context, a risk is characterized by the probability of an event occurring and its potential impact on the project. The Technical Board will take ownership and manage this process.

During the preparation of the Grant Agreement, significant risk areas were identified. To preempt or alleviate situations that could impede the successful fulfillment of the project's objectives and milestones, preliminary contingency measures have been developed and are detailed in the table below.

Table 7 Critical Implementation risks and mitigation actions

Risk number	Description of Risk	WP affected	Proposed risk-mitigation measures
1	Delays and/or inadequacies/errors in the submission of administrative and financial documents crucial for monitoring or reporting. Delayed submission of reporting documents, and/or submission of inadequate or inaccurate documents can put at risk the delivery of the progress report (high impact) and the preparation of the quarterly monitoring reports (medium impact). The likelihood of the risk can be considered MEDIUM.	WP1	The preparation of the Project Management Plan can help reduce the risk of inaccuracy of partners' documentation. Partners will commit to appoint an adequate number of human resources to deal with administrative and financial issues. At the beginning of the project, these resources will be trained by the PM and the coordinator's FM on the reporting procedures. The PM and the coordinator's FM will start the collection of documents with adequate advance before the deadlines, send e-mail reminders to partners, and remain at their disposal for any clarification
2	Difficulties in establishing the inter-municipal technical structures (IMTS). The creation of IMTS is the first step of the project and these structures will guide and implement all the main activities of the project. Therefore, any procedural problem or delay in the selection and contracting of experts in target areas can put project implementation at risk (high impact). The likelihood of the risk can be considered MEDIUM	WP2	The selection procedure will be launched by the partners in charge right at the beginning of the project, in order to have adequate time margins. High accuracy in the drafting of the tendering documents (supervised by the WP leader) is expected to avoid tender abandonment, appeals and claims that could cause delays in the appointment of the experts. Experts shortlists already available will be taken into account, and the use of existing public procurement platforms will be considered.



3	<p>Lack of involvement of local technical officers in the advanced training. Failure to obtain a continuous engagement of public officers from involved municipalities in the training activities can prevent the establishment of the IMTS, put the entire implementation of WP3 at risk and jeopardize the sustainability of the project results (high impact). The likelihood of the risk can be considered MEDIUM.</p>	WP2	<p>Partners have already secured the commitment of target municipalities through letters of support, and they will work with them to identify the most suitable officers to involve in the project right from the start. Target municipalities must be aware of the importance of ensuring the continuity of the engagement of selected officers.</p>
4	<p>Lack or unavailability of data for the construction of the local geodatabases. Failure to build reliable local geodatabases can make the energy planning more difficult and less tailored to local needs, resulting in less effective and feasible actions and in monitoring problems (medium impact). Given the small size of the target municipalities and their current situation, the likelihood of the risk can be considered HIGH.</p>	WP3	<p>The appointment of external experts within the IMTS in target areas and the involvement of supra-local organizations as partners is expected to help the sourcing, collection and processing of relevant data</p>
5	<p>Delays in the implementation of T.3.2 (Plans alignment and updating), T.3.3 (Strategy definition) and T.3.4 (Implementation of local initiatives). Delays can occur due to the complexity of procedures, especially those regarding the entrustment of local initiatives works by the end of the project and can put at risk the full achievement of project objectives (high impact). The likelihood of the risk can be considered MEDIUM.</p>	WP3	<p>This risk has been taken into account in the preparation of the proposal: the time plan was designed accordingly, providing for adequate time margins to 'absorb' any delays. Moreover, the inclusion within the IMTS of experts in administrative procedures can help mitigate the risk.</p>



6	Lack of funding for clean energy measures. The lack of financial resources for implementing clean energy measures can hamper the operation of IMTS and the overall long-term sustainability of project results. The likelihood of the risk can be considered LOW.	WP4	Plenty of funds for clean energy measures are being made available through ERDF Programmes (mainly by means of regional calls) and through RRF (national and regional calls). The challenge for small municipalities is rather to get access to them and use them efficiently. Part of the tasks of IMTS will be to constantly monitor open and upcoming calls to apply to, and to perform other fund-raising activities among public and private investors. The meetings with the authorities in charge of managing ESI or national funds, foreseen in T.4.3, are also meant to support beneficiaries in their applications, and facilitate their access to the available resources
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## 8 Deliverable monitoring and reviewing

In order to ensure the project's deliverables meet the highest standards, the consortium is required to adhere to a specific procedure for thorough review before submission to the EC. The procedure is outlined as follows:

The lead beneficiary responsible for the deliverable must release an initial draft ten working days before the scheduled delivery date. This draft will be shared with other task participants and the Work Package (WP) leader.

Participants and the WP leader are given a five-day period to provide their feedback and comments to the lead beneficiary. Subsequently, the lead beneficiary has five days to consolidate and incorporate these inputs. The finalized deliverable is then forwarded to the project coordinator, who has a few days to upload it onto the Participant Portal.

## 9 Internal Communication

The internal communication strategy ensures that partners are consistently kept abreast of the project's status, covering all crucial issues to enhance transparency and collaboration. Interactive management meetings are a key component of this communication approach. All information, including meeting minutes, visit reports, and relevant publications, will be shared with the Project Coordinator, who will then disseminate this information to other partners as needed.

To facilitate member attendance, all regular meetings of the Project Consortium will be scheduled well in advance. An appropriate agenda, proposed resolutions, decisions, and possible solutions, if applicable, will be distributed to all members at least one week before the meeting. Meeting minutes will be circulated within a week.



To manage costs effectively, internal communication will primarily utilize channels such as email, telephone, and online platforms. Face-to-face Project Consortium meetings are conducted to strengthen personal relationships and address issues in a conducive environment.

## 9.1 Workspace for Collaboration

To facilitate internal communication, document distribution, and storage, a dedicated Google Drive folder has been established. All partners have been granted access to this folder (refer to Figure xx).

Όνομα ↓	Κάτοχος	Τελευταία τροποποι...	Μέγεθος αρ	
WP4	εγώ	14 Ιουλ 2023 εγώ	—	
WP3	εγώ	14 Ιουλ 2023 εγώ	—	
WP2	εγώ	14 Ιουλ 2023 εγώ	—	
WP1	εγώ	14 Ιουλ 2023 εγώ	—	
PROPOSAL	εγώ	14 Ιουλ 2023 εγώ	—	
PARTNERSHIP AGREEMENTS	εγώ	15 Σεπ 2023 εγώ	—	
Mailing List_Partners.xlsx	εγώ	23 Νοε 2023 εγώ	11 KB	
lifeSMART_timetable_20232220.docx	εγώ	5 Δεκ 2023	14 KB	
annex1_GAP-101120908.pdf	Christos Papantos	24 Νοε 2023 Christos Papa...	1,4 MB	

Figure xx SMART’s Google Drive shared folder screenshot

## 9.2 Contact/Mailing List

A centralized contact/ mailing list is maintained by the Project Coordinator, and it will be periodically updated on input from partners. The contact list is organized according to the work plan structure (i.e. Tasks, Work packages, etc.). The contact list is available in the workspace for collaboration among the partners and it is the responsibility of the Project Coordinator to keep it updated.



### 9.3 Templates

The Project Coordinator provides templates to be used for the aforementioned processes. These templates will be available as MS Word (docx) or MS Excel (xlsx) files. Some of the templates that will be available in the private area are:

- Template for task and WP progress monitoring.
- Template for 6-monthly use of resources reports to be provided per partner.

In addition to that, the partner responsible for elaborating the Communication Plan + Communication kit will provide:

- Template for project presentations
- Template for reporting (agenda of the meetings, deliverables, etc.)
- Template for the list of participants to meetings

It is the responsibility of the Project Coordinator to check that the partners will use them and keep the templates up-to-date.