EFFECT PROJECT

Creating effects through communication and engagement in Future and Emerging Technologies

D1.6 Project Management Plan

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27 April 2017

Technical references

Project Acronym	EFFECT
Project Title	Creating effects through communication and engagement in Future and Emerging Technologies
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Project Duration	January 2017 –December 2018 (24 months)
Deliverable No.	D1.6
Dissemination level*	CO
Work Package	WP 1 - Project Management and Communication Strategy
Task	Task 1.2 Project management and internal coordination
Lead beneficiary	YOURIS
Contributing beneficiary/ies	-
Due date of deliverable	30 April 2017
Actual submission date	27 April 2017

PU = Public

PP = Restricted to other programme participants (including the Commission Services)

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)

v	Date	Beneficiary	Author
1.0	05/04/2017	YOURIS	Alice De Ferrari
2.0	26/04/2017	YOURIS	Elisabeth Schmid

Disclaimer

Executive Summary

This document describes the approach that shall govern the overall project management of the EFFECT Project. It consists of a plan and a methodology that EFFECT will follow to grant the optimal outputs from the project.

It presents the various consortium bodies that shall regulate EFFECTS's activities as well as the different procedures that will be implemented in order to ensure smooth operations within the project and among the partners.

It illustrates the main responsibilities for each partner, the mechanisms to ensure the quality of the deliverables and the approach to potential conflict resolution.

The document describes the rules for regular and fluent communications between partners: project meetings, monthly calls and the document exchange repository are listed. It also contains the project structure and the list of technical deliverables, milestones and reports expected during the project lifetime.

Executive Summary

1 Table of Content

2 Introduction

The Project Management Plan (PMP) will

- recap in detail the project activities, timeframe, deliverables and milestones as well as its management structure and decision-making procedures,
- detail rules for internal communication, and
- describe the approach to potential conflict resolution, project quality assurance, monitoring and evaluation.

The Project management plan aims at ensuring an optimal implementation, coordination and integration of all EFFECT activities in view of attaining project objectives and achieving expected outcomes on specifications, time and budget.

In case of doubts or omissions, the Consortium Agreement and the Description of Action terms will represent the main reference for the project management.

3 EFFECT management structure and procedures

3.1 The consortium

The EFFECT Consortium merges a variety of complementary expertise, aiming to build a consistent and sound public communication mechanism centred on the achievements and future developments of EU FET research. The long-running experience in working with the European Commission shall be seen as a key added-value for the EFFECT Consortium.

The Consortium covers the entire value chain of communication of research supported by a panel of FET experts members of the EFFECT Advisory Board, and includes:

- A public communication producer and distributor on European research and innovation. The coordinator, **youris.com G.E.I.E.** (YOU), is an information producer and distributor.
- A hub of research and innovation, multiplier and contact point throughout a variety of different stakeholders (academia, SMEs, indutstry, investors, etc.). **APRE** is the host organization of the Italian National Contact Points for all the themes and sectors of HORIZON 2020.
- An innovation and value creation partner, **Zabala** (ZAB). Zabala is a 30 years old innovation consultancy.

3.2 EFFECT's management structure and bodies

The organisational structure is characterised by the following constitutional bodies: The **Coordinator**, The **Management Board, The Project Manager,** The **Work Package leaders** and an **Advisory Board**, a group of experts, who will support EFFECT by screening reports produced via the direct interviews with the FET projects willing to be communicated and supported by EFFECT and assessing and validating them in terms of results, excellence, potential impacts on society in view of processing project-related topics into communication formats and topics of discussion for engagement activities.

3.2.1 The coordinator

youris.com plays the role of EFFECT coordinator and is responsible for EFFECT's day to day management.

The Coordinator of the EFFECT project will be the focal point of contact with the European Commission regarding the exchange of information on technical issues (including budgetary and administrative procedures) and the development of the work plan. The coordinator has the duty of continuous monitoring of the project - key elements under consideration are described below:

- Regular communication with the European Commission at least on a six-monthly basis.
- Communication between the partners, with five meetings planned during the project.
- Quality of the outputs.
- Respect of established time schedules.
- Budget constraints.

3.2.2 The Management Board

The Project Management Board, consisting of one representative per partner, will act as steering and management committee and will be the exclusive decision-making body of the Consortium. One main aim of this Board is to advise and support the decisions of the Project Coordinator on operational and management issues. This board will be responsible for all decisions of general nature within the frame of the EC Contract and the Consortium Agreement. Each Project Management Board Member shall be deemed to be duly authorised to deliberate, negotiate and decide on all matters listed in the Consortium Agreement. The Project Management Board is responsible for all decisions affecting more than one partner, such as contractual matters, planning, financial matters, major technical decisions, reporting. The detailed responsibilities and tasks are described in the project's Consortium Agreement. The Project Management Board is chaired by the Project Coordinator and will be convened twice in face to face consortium meetings (kick off meeting in month 1 and progress meeting month 13) and whenever needed through audio conferences.

3.2.3 The Work Package Leaders

Each work package has a designated work package leader responsible for:

- Coordinating the WP tasks with the partners and associates participating in those tasks;
- Ensuring the quality control of the partners and associates contributions;
- Gathering these contributions to prepare the corresponding high quality work package deliverable;
- Screening from FET work programmes to identify and select stories, messages and topics, harmonising the projects' baseline relevant for FET and search for involvement and commitment of results' owners, interviewing the projects, via ZAB;
- Interfacing directly with the Advisory Board (selection of contents, key messages), via APRE;
- Dealing with all issues concerning the development and the implementation of the editorial products (videos, articles, news releases), via YOU;
- Developing and supervising the editorial and distribution strategy of the project and regularly produce an editorial calendar, via YOU;

- Developing all written and visual material delivered by the project (press releases, editorials, articles, dope sheets, etc.), in close co-operation with the other partners of the project, via YOU, APRE and ZAB;
- Supervising the overall definition and supervision of the broadcasting and publication policy, via YOU;
- Engaging with stakeholders and policy-makers via Meet&Match events and workshops on "Open FET to innovative and responsible future scenarios", via APRE and ZAB;
- Monitoring all project activities in order to have always an up-to-date idea of state of advancement of the project and, where appropriate, to suggest changes and adjustments to the original work plan concerning editorial aspects, via YOU;
- Defining the overall engagement strategy and plan, according to the different targets and activities, via YOU and APRE.

3.2.4 The Advisory Board

The Advisory Board will be formed by FET experts (the project aims at a group of 10 experts). The overall content identification process and validation of contents and messages to be processed into communication formats will be supported by the Advisory Board who will physically meet at the end of the screening process, expected in Month 6, in order to:

- Provide guidance to the selected research topics and applications according to scientific and other criteria, (such as innovation, EU excellence, market exploitability);
- Supervise the whole key results identification process;
- Screen the short reports describing the project, its results and excellence, its impacts for society and the specific communication formats through which the project-related topics will be processed.

3.3 Rules for internal communication and meetings

The smooth progress of the EFFECT implementation will require a proper coordination of the above listed bodies, which will imply the definition of a proper internal communication.

The communication flow in EFFECT will be arranged through typical means, such as e-mail, and will make use of management tools specially designed for collaborative projects such as online communication, work-spaces and mailing lists. Meetings will be crucial for facilitating smooth communication among partners and will be focused on technical discussions, progress monitoring, decision-making and conflict resolution.

The following list of meetings (both in person and virtual/online ones) has been planned:

- Project Meetings – in person - every six months, given that the consortium shall convene ordinary meetings of the General Assembly at least twice a year;
- Monthly audio-meetings, depending on the project's work plan needs. Skype will be the web conferencing software tool used to hold EFFECT monthly meetings;
- Ad hoc meetings (in case of any urgent matters appearing in relation to EFFECT).

This close communication is essential for monitoring and reporting since WP leaders are responsible for preparing reports about the WP progress, including deliverables and milestones.

A Dropbox folder has been created and shared to be used as a document sharing and work-space enabling members of the EFFECT consortium to access project-related contents (e.g.

deliverables, reports, etc.). The structure of the internal area is simple and easy to be managed by every single member.

3.4 Project quality assurance, monitoring, evaluation

The WP leaders take care of the overall management of the respective WPs. Their main responsibility is to oversee the harmonisation between the different tasks within the WP. They coordinate the work of the task leaders, and ensure the timely and quality preparation of all technical deliverables that are subsequently collected and submitted to the project coordinator.

The coordinator is in charge of:

- Assuring overall quality of project deliverables and their punctual submission to the EC;
- Monitoring the progress of the EFFECT workplan implementation;
- Identifying any deviations and propose corrective measures;
- Monitoring and assessing budget expenditure by WPs and by group members;
- Evaluating EFFECT actions implementation in view of project objectives and attainment of the expected results.

4 Project's structure

To ensure the efficient and smooth implementation of the project, activities have been organized in Work Packages (WP), led by a partner, and divided into Tasks and Sub-Tasks, managed in collaboration with the other partners.

The EFFECT project work plan is divided into five work packages, including Management.

- **WP1 – Management**, which includes activities covering the overall project management, relations with the Commission, quality assessment and risk management. This WP also covers activities related to the project's Communication Strategy and Plan, the project's visual identity and set up of the project's basic communication channels.
- **WP2 – Content Provision**. The objective of this WP is to identify the contents for the overall editorial production to be transformed into specific communication formats (WP3) and to identity key themes from EU FET research that will stimulate and animate the debate and collaboration involving different stakeholders in the public engagement process (WP4). This WP will act as a "story seeker" for the different communication formats developed for web, TV and social media. The identification of the specific EU FET key themes and definition of key messages will be made in close co-operation with the Advisory Board, a panel of experts who will validate the contents and messages to be processed into communication tools in cooperation with the editorial team (WP3) and into topics of discussion for the engagement activities (WP4).
- **WP3 – Public communication and distribution** includes a set of communication products tailored for different target groups to be distributed via different channels. Editorial calendars will define the right angles, communication formats and channels on a regular periodic basis. Communication products will include: 1) videos, in the format of Video News Releases for TV distribution, short video interviews and web videos, ii) articles and testimonials around the identified FET themes in WP2; 2) posts to be distributed via social media (based on WP2 material and additional news scouting on FET EU research); 3) news releases for specific target groups choosing the right language and focus for each of them; 4) multimedia stories and special e-mag issues (via innovative interactive publishing tools, such as PageFlows and Scoop.it). All the products will be intensively

distributed exploiting online, social and TV media channels as well as the partners' existing networks of stakeholders' contacts.

- **WP4 – Community building and engagement** will aim at stimulating public debate, collaborative learning and networking among multiple players of the FET domain. Based on WP2 contents and communication good practices in WP3, a number of initiatives and events will be organized to support the creation of a collaborative research and innovation framework: beyond social media channels addressing an online FET community, dedicated events such as infodays and brokerage events, workshops and webinars targeted to citizen, innovators, policy makers, scientists.
- **WP5 – Monitoring of Results**, providing a quantitative measure of the success of EFFECT according to the metrics described in Section 2.2. In WP5 a set of Recommendations for the Commission Services and a Good Practices Communication KIT produced as an electronic flip-book to support public communication in on-going and future FET projects will represent the outcomes and legacy with EFFECT for future exploitation and guarantee the sustainability of the project

The following diagram shows the interconnection of the work package components and the flow of the proposed communication actions.
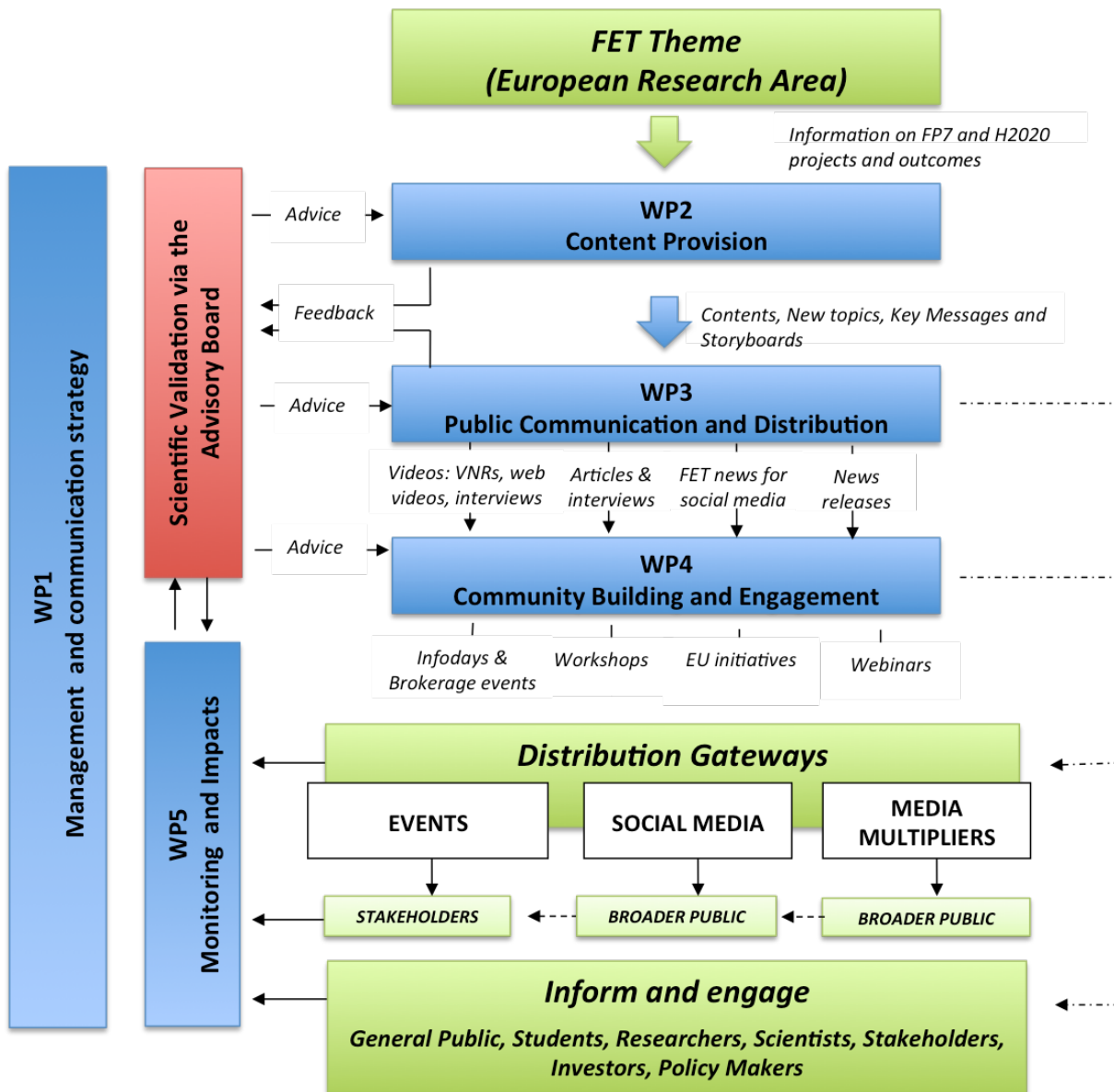
Figure 1 Work packasges and communication flow

4.1 Timeframe

The timing of the project is reported in the Gantt chart below.

		M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24
WP1	**Management and Coordination**																								
T1.1	Project administration: the administrative and financial management of the project																								
T1.2	Project management and internal coordination			D1.6		D1.7								D1.4											D1.5 D1.10
T1.3	Communication and Engagement Strategy and Plan, visual identity and branding policy		D1.1 D1.3												D1.2										
T1.4	Collaboration with on-going funded FET CSAs and initiatives												D1.8												D1.9
WP2	**Content Provision**																								
T2.1	Refine and harmonise the projects' baseline relevant for FET nad update factual information via desk research		D2.1																						
T2.2	Searching for involvement and commitment of results' owners, interviewing the projects									D2.4				D2.5											
T2.3	Indentify contents (and individuals) suitable for public communication and engagement						D2.2																		
T2.4	Validation of results through the Advisory Board						D2.3																		
WP3	**Public Communication and Distribution**																								
T3.1	Content Provision for public communication												D3.1						D3.6						
T3.2	Video communications												D3.4												
T3.3	Editorial communications												D3.5												
T3.4	Distribution										D3.2		D3.3												D3.7
WP4	**Community Building and Engagement**																								
T4.1	Organisation of two Infodays on FET funded research and related Brokerage Events													D4.1					D4.2						
T4.2	Two workshops on "Open FET to innovate and responsible future scenarios"									D4.3													D4.4		
T4.3	European Researchers' Night and/or EC Mass Media, Futurium Forum									D4.5													D4.6		
T4.4	Three webinars addressing ongoing FET projects																						D4.7		
WP5	**Monitoring and Impacts**																								
T5.1	Web and social media monitoring												D5.1												D5.6
T5.2	TV monitoring																	D5.3							
T5.3	Monitoring of community building and engagement												D5.2												
T5.4	Recommendations																						D5.4		
T5.5	A practical good practices communication kit in ongoing and future FET projects																						D5.5		
WP6	**Ethics Requirements**		D6.1 D6.2																						

5 Deliverables, Milestones and Reports

Each partner's activity is assessed and valued through a list of deliverables and milestones, related to Tasks and Sub Tasks, due in different moments of the project. A single partner is responsible for its deliverables and milestones, with the possible support of other involved partners.

5.1 Deliverables

The list of deliverables expected by EFFECT is described in the following table:

Deliverable Number	Deliverable Title	WP number	Lead beneficiary	Type	Dissemination level	Due Date (in month)
D1.1	Communication and Engagement Strategy and Plan, including logo and templates - First release	WP1	YOU	Report	Public	2
D1.2	Communication and Engagement Strategy and Plan, including logo and templates - Second release	WP1	YOU	Report	Public	14
D1.3	Website online	WP1	YOU	Websites, patents filling, etc.	Public	2

D1.4	Action Check Meeting - First Release	WP1	YOU	Report	Confidential, only for members of the consortium (including the Commission Services)	13
D1.5	Action Check Meeting - Second Release	WP1	YOU	Report	Confidential, only for members of the consortium (including the Commission Services)	24
D1.6	Project Management Plan	WP1	YOU	Report	Confidential, only for members of the consortium (including the Commission Services)	4
D1.7	Data Management Plan	WP1	YOU	ORDP: Open Research Data Pilot	Public	6
D1.8	Dissemination and Exploitation Plan - First Release	WP1	YOU	Report	Public	12
D1.9	Dissemination and Exploitation Plan - Second Release	WP1	YOU	Report	Public	12
D1.10	Update of Data Management Plan	WP1	YOU	ORDP: Open Research Data Pilot	Public	24
D2.1	First release of the projects' database	WP2	ZAB	Report	Public	2
D2.2	Methodology of Content Screening	WP2	ZAB	Report	Public	6
D2.3	Definition of Criteria for Scientific Evaluation	WP2	APRE	Report	Public	6
D2.4	Report on content collection and selection	WP2	ZAB	Report	Public	8
D2.5	Update of Report on content collection and selection	WP2	ZAB	Report	Public	14

D3.1	First Report on Public Communication and Distribution	WP3	YOU	Report	Public	12
D3.2	Final Report on Communication and Distribution	WP3	YOU	Report	Public	24
D3.3	Online, social and TV media indicators used to measure outreach and impacts	WP3	YOU	Report	Public	12
D3.4	Editorial Plan - First Release	WP3	YOU	Report	Public	12
D3.5	Editorial Plan - Second Release	WP3	YOU	Report	Public	20
D3.6	Video Productions	WP3	YOU	Websites, patents filling, etc.	Public	23
D3.7	Editorial Productions	WP3	YOU	Report	Public	24
D4.1	Report on impact of Infodays on FET funded research and related Brokerage Events - First Release	WP4	APRE	Report	Public	13
D4.2	Report on impact of Infodays on FET funded research and related Brokerage Events - Second Release	WP4	APRE	Report	Public	19
D4.3	Report on the workshops on "Open FET to innovative and accepted responsible uture scenarios" - First release	WP4	ZAB	Report	Public	10
D4.4	Report on the workshops on "Open FET to innovative and accepted responsible future scenarios" - Second Release	WP4	ZAB	Report	Public	22
D4.5	Report on civil society engagement activities - First Release	WP4	APRE	Report	Public	10
D4.6	Report on civil society engagement activities - Second Release	WP4	APRE	Report	Public	22
D4.7	Report on webinars' content and stakeholders needs	WP4	APRE	Report	Public	23
D5.1	Analysis of EFFECT impacts - First Release	WP5	YOU	Report	Public	12

D5.2	Analysis of EFFECT impacts - Second Release	WP5	YOU	Report	Public	24	
D5.3	Recommendations	WP5	APRE	Report	Public	24	
D5.4	A practical good practices communication kit	WP5	YOU	Report	Public	23	
D5.5	Monitoring of TV distribution	WP5	YOU	Report	Public	24	
D5.6	Report on community building and engagement	WP5	APRE	Report	Public	24	
D6.1	POPD - Requirement No. 1	WP6	YOU	Ethics	Confidential, only for members of the consortium (including the Commission Services)	3	
D6.2	NEC - Requirement No. 3	WP6	YOU	Ethics	Confidential, only for members of the consortium (including the Commission Services)	3	

Table 1. List of EFFECT deliverables

Legend: Green: submitted - Orange: in progress

5.2 Milestones

Milestones are achievements to mark specific points along a project timeline. The list of Milestones expected by EFFECT is described in the following table:

Milestone Number	Milestone Title	WP number	Lead beneficiary	Due date (in months)	Means of verification
MS1	Communication and Engagement Strategy and Plan	WP1	1 - YOU	2	Delivery of the principal document outlining the strategic activities of the EFFECT project
MS2	Screening results validated by the Advisory Board	WP2	3 - ZAB	7	All the projects analysed, interviews carried out, contents identified, submitted and validated by the Advisory Board.
MS3	First delivery of communication products	WP3	1 - YOU	15	First set of communication tools produced and distributed: 2 web

					videos, 1 Video News Release, 6 video interviews, 6 articles, 10 news releases
MS4	First round of community building and engagement activities performed	WP4	2 - APRE	12	First round of community building and engagement activities performed - one infoday, one webinar, one workshop, open consultation launched.
MS5	Project outreach and engagement	WP5	1 - YOU	12	Project outreach and engagement – First measurement of the impacts generated by the project

Table 2. List of EFFECT milestones

Legend: Green: achieved.

5.3 Action checks and internal reporting

Each partner will submit to the Coordinator every 6 months a technical and financial progress report for internal use. The progress reports will include information about the work done, completed deliverables, risks, delays and measures taken, as well as the estimation of person months and estimation of budget spent so far for the implementation of the Project. The financial information given in said reports cannot be considered exact or binding for the official reporting but will anyway provide an overview of the expenditure and costs.

In addition, two action check meetings have been planned with the EC commission services (month 13 and 24) to monitor the work in progress and the final results from a technical and financial point of view. On this occasion an overview of the technical achievememnts and expenditure in terms of resources and costs will be produced and presented. The supporting documentation (agenda, minutes, presentations) will officially compose the Action Check meetings releases.

6 Conclusions

Given the small composition of the consortium of the EFFECT Project - three partners - management activities will be carried out in a smooth and efficient way. Every measure described above will be taken in order to ensure the best outcomes of the project. The coordinator will conduct regular monitoring of the progress in EFFECTS's implementation and evaluation of its results against the proposed work plan, in order to update the project management implementation if needed.