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Abstract	Definition of the Consortium operating procedures summarising all the required knowledge for the good management of the project (in terms of administrative forms, financial aspects, quality process...) definition of performance indicators; establish the guidelines for financial reporting, presentation standards for deliverables and reports; define classified information and guarantee the maintenance of the chain of custody and include an internal review procedure to guarantee the quality of the results of the project.



Versioning and Contribution History

Version	Date	Modified by	Modification reason
v1.0	23/03/2018	Pilar Raya	First version
V2.0	04/04/2018	Pilar Raya	Comments suggested after the peer review process were considered

List of Abbreviations and Acronyms

Abbreviation/Acronym	Meaning
AB	Advisory Board
CA	Consortium Agreement
DoA	Description of Action
EC	European Commission
GA	Grant Agreement
WP	Work Package
CSA	Coordination and Support Action
WG	Working Group
MST	Management Support Team
PC	Project coordinator

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Executive summary

The purpose of this deliverable is to define the Consortium operating procedures summarising all the required knowledge for the good management of the project (in terms of responsibilities, communication procedures, reporting, dissemination process...).

This document is based on the terms and conditions established in the Grant Agreement (GA) and its Annexes, as well as in the Consortium Agreement.

1. Introduction

This Project management handbook has mainly two functions.

Firstly, it is a reference source for all consortium members covering many day-to-day activities. Secondly, it intends to standardise various elements of the project through the use of agreed procedures and templates where relevant.

It will be a dynamic document and will be updated as required throughout the project.

The general principles for the project execution are defined in the EU Grant Agreement (GA), the Description of the action (DoA) and the Consortium Agreement (CA).

2. Management Structure – roles and responsibilities

The management structure aims at safeguarding the effective cooperation among the members of the Consortium and at producing high quality deliverables to the Commission during the various stages of the project life. The overall management structure will endorse links between INBOTS CSA partners and build and strengthen new interactions, especially by enabling and fostering the transfer of complementary expertise between the involved research, industry, end-users and other relevant stakeholders players and countries. Within the INBOTS CSA Consortium, each participant will take an active part in the efficient implementation of the CSA, and will cooperate, perform and fulfill, promptly and on time, all of its obligations as foreseen in the GA.

The main challenges of INBOTS CSA will be addressed through the organisational structure described in the figure below.

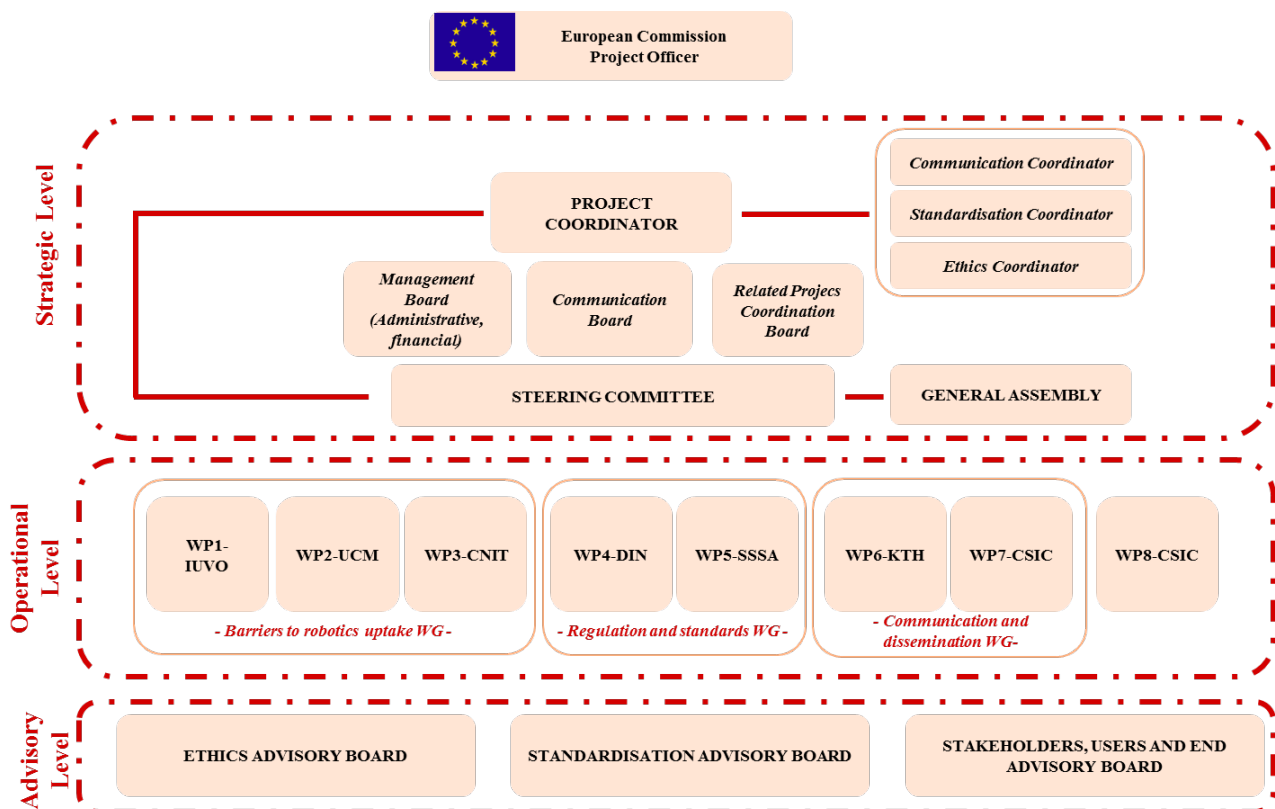


Fig. 1. Project Organizational Structure

2.1. Coordinator

Prof. José Pons (CSIC) will act as coordinator. The Project Coordinator (PC) will duly inform the Project Officer of any contingency that may occur along the project and will be the spokesperson for the Project Officer. Therefore, the Project Coordinator will be responsible for the continuous monitoring of the project.

2.2. Steering Committee

It will be made up of:

- Chair: Project coordinator, Jose L. Pons, CSIC
- Vice-Chair: Pilar Raya, CSIC
- Work Package Leaders
- a General Assembly (composed by all partners), and
- three different boards (Management, Communication and Related Projects Coordination Boards)

The Steering Committee (SC) is the decision-making body within the project for all significant project issues. The SC is responsible for the project and the daily management is delegated to the Project Coordinator and the Project Management Team. The SC is responsible for the agreement on the working program and the interaction between the WPs, of the publication, distributing and updating the working rules of the project. Will also take decisions and agreements on possible changes and adjustments in work packages, time-lines, consortium composition and budget allocations; submission of the agreed proposal to the General Assembly for the final decision. The Steering Committee will be in charge of other issues of research, discussion and dissemination of project results.

2.3. Management, Communication and Related Projects Coordination Boards

These boards have been created to assure project management, administrative and financial coordination and the effective interaction with related projects, as well as to follow up the compliance of communication procedures. They will be composed as follows:

- Management Board:
 - Chaired by the Vice-chair Steering Committee (Pilar Raya, CSIC).
 - All project beneficiaries represented and report on management, administrative and financial issue.
- Communication Board:
 - Chaired by WP7 Leader (Maria Prieto Sauco, INNCOME).
 - All project beneficiaries represented and report to follow up the compliance of communication procedures.
- Related Projects Coordination Board:
 - Chaired by Jan Veneman (TECNALIA)
 - All project beneficiaries represented and report to follow up on the effective interaction with related projects.

2.4. Communication, Standardisation and Ethics Coordinators

Furthermore, an Ethics, Standardisation and Communication Coordinators have been designated in order to maintain the appropriate coordination with the corresponding boards at the advisory level and with the working groups at the operational level.

These coordinators are the following:

Ethics coordinator: Vincent Müller

Standardisation Coordinator: Saskia Maresch (DIN)

Communication Coordinator: María Prieto Sauco (INNCOME)

2.5. Management Support Team

Management, Communication and Related Projects Coordination Board and the Ethics, Standardisation and Communication Coordinators will keep continuous interaction with the SC and the PC, and will constitute the Management Support Team (MST).

2.6. Work packages leaders

At the operational level, leaders have been appointed for the eight different WPs of INBOTS CSA. The WP teams are responsible for an effective and efficient implementation of the work associated with a specific work package. A WP Team consists of a WP Leader, leading investigators of the consortium partners who are active in that work package, and partners who are expert in the area.

2.7. Working group on sustainability

A specific working group on sustainability has been created to ensure the sustainability of INBOTS CSA initiatives after the project.

During the Kick-off meeting, the project Coordinator asked to the partners to propose a person for each WP to be part of the Working Group on Sustainability. The following names were proposed during the parallel meetings:

WP1: Roberto Conti

WP2: not discussed

WP3: not discussed

WP4: Massimo Di Pardo (CRF)

WP5: Andrea Bertolini

WP6: not discussed

2.8. External Advisory boards

At the advisory level, three Advisory Boards (AB) have been created: Ethics, Standardisation and Stakeholders, Users and End User Advisory Board. This level includes independent groups composed by senior experts, stakeholders, users and end-user chaired by the PC. These experts represent science, industry, standardization, ethical, regulatory and general public perspectives. It will also be instrumental in dissemination and exploitation of project result as well as quality of deliverables and overall project status.

3. Communication

Appropriate communication measures will be taken to ensure the way INBOTS CSA promotes its findings and engages with the public and the media, as well as to demonstrate the ways in which is contributing to a European 'Innovation Union' and to the aims and impacts of the SRA and the MAR. The communication activities will be executed following a devoted Communication Plan (CP), that will ensure the design, implementation and follow up of an efficient communication strategy, starting with the mapping of key messages and targeted audiences (robotics community, industries, SMEs, entrepreneurs, general scientific community and general public) to any adjustment that will be necessarily made during the implementation of the different actions. The Communication Plan will include specific strategies focused on enhancing the impact and performance indicators.

Two aspects of communication activities are envisioned: information flow between the partners of the Consortium and the presentation of the project results outside the Consortium.

3.1. Internal communication

Meetings:

Kick-off meeting (milestone 1): clearly planning the initial work for each WP.

WP annual meetings will take place on a yearly basis rotating physical location. Partial supplementary meetings can take place upon request from any partner. These annual meetings will serve to debate and discuss the relevant topics, to address ongoing activities and to plan the work for the subsequent period.

WP progress teleconference meetings will be held every two months to monitor and verify the work progress of their respective WP. These meetings will help update project status on a regular basis as well as having the opportunity to discuss technical, operational and administrative issues on a timely fashion.

WPs coordination teleconference meetings: between the leaders of each WP.

INBOTS conferences, where annually the entire consortium will meet to discuss the results achieved during the year and share the knowledge with the community (milestones 3, 4 and 5).

Annual consortium plenary meeting, that will be realized the day after or the day before the conference's closure/starting.

Email:

Many people may be working on a number of different projects and are likely to receive numerous emails every day, therefore, a standard subject title is proposed. This helps to quickly recognise the project related emails.

Project related e-mails should include in the subject title: 'INBOTS' and WP number (if applicable) followed by a more specific description of the subject, deadline for feedback or reply, see below an example:

[Subject: INBOTS: Kick off meeting minutes, till May 11th 2016]

Intranet:

A project Intranet was set up to act as repository for all working documents, minutes and reports. The address of the Intranet is:

<http://inbots.eu/wp-login.php>

Every member of the consortium has access to the Intranet.

More information about the Intranet was described in D7.1. INBOTS CSA website.

3.2 External communication

External communication is considered towards parties outside the consortium, target groups of the project, stakeholders and the EU Project Officer.

There will be different mailing lists, which can be found on the Intranet together with the contact list. Required changes can be sent to INNCOME.

The external communication is part of "WP7. Organize dissemination & robotics community outreach activities" for which INNCOME is responsible.

Communication of project results is an important part of a H2020 project. More information will be included in the deliverable 'D7.3 Communication Plan', due in April 2018 (M4).

Project website:

INBOTS CSA count with a project website that will enable the project to communicate the project results to the general public, healthcare authorities and stakeholders. The website includes general information about the project, its partners, and the crucial project results and achievements, including all the public deliverables.

The website will be regularly updated, and project related publications, brochures, presentations and any other material, which may be generally distributed, will be available via the public part of the website.

The project website can be found at <http://www.inbots.eu/>

More information about the website was described in 'D7.1. INBOTS CSA website'.

Social networking: Some of the content from INBOTS CSA website will also have online presence through social media sites and tools such as LinkedIn, YouTube or Facebook. These channels will be used to disseminate the activities and outcomes of the project, to strengthen the impact of the project and to reach the widest possible audience within the end-user and the general public.

The project uses the following social media:

LinkedIn: <https://www.linkedin.com/company/inbots-csa/>

Twitter: https://twitter.com/INBOTS_CSA

Facebook: <https://www.facebook.com/INBOTSCSA/>

Any content to be shared using social media should be sent to the WP7 Leader.

Dissemination Material: leaflets, brochures, posters, roll-ups, events information, etc., will be elaborated to promote INBOTS results. The materials will be of a high quality standardised format and will be distributed in the regular dissemination activities of all partners. The dissemination materials will be available in English. These materials will be available in the website.

Dissemination videos explaining project objectives, outcomes and testimonials will be prepared, to illustrate the benefits resulting straight from the outcomes of INBOTS CSA. The videos will be visible to the wide public, as it will be used in the mass-media dissemination and in the related events. Three documentary videos will be released, describing the achievements of the project for the first, second and third year of the CSA. These materials will be available in the website.

Media-related actions (press releases coordinated at a project level, interviews) will be undertaken to strengthen the impact of the project and to reach the widest possible audience within the end-user and the general public. INBOTS CSA will have presence on traditional media, such as TV or radio programmes. These materials will be available in the website.

Liaison with related research initiatives: INBOTS CSA will work together and will be aligned with other funded similar projects to widen the dissemination of its results. Updated information about these activities will be published in the website.

Dialogue with policy makers, stakeholders, educational associations and community will be sought to demonstrate benefits for the society and user community. Updated information about these activities will be published in the website.

INBOTS CSA workshops and organisation of general communication and dissemination events: several events will be organised to communicate the outcomes of the project to the

robotics community, relevant stakeholders and general public. Updated information about these events will be published in the website.

3.3. General requirements

All the communications will indicate that the project has received funding from the European Union. The following requirements will be considered:

(a) display the EU emblem:



(b) include the following text:

'This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 780073'.

(c) include the project logo

The project logo can be found in the Intranet.

Templates:

All public documentation needs to conform the document standards provided by the Project Coordinator.

All project templates (deliverables, presentations, document standard) can be found in the Intranet and in 'D8.2. Quality Assurance Plan'.



4. Monitoring and reporting progress

4.1. Performance monitoring

Progress will be monitored against the following project milestones, identified in the Grant Agreement (GA), Annex I:

Milestone number	Milestone title	WP n°	Lead beneficiary	Due date	Means of verification
1	Kick-off meeting	WP8	CSIC	1	Plan of actions. List of action items for participants.
2	Consortium Set-Up complete	WP8	CSIC	3	Project Plan, Schedule signed-off. Management procedures defined and agreed among partners. D8.1
3	Middle-term Conference	WP7	CSIC	12	Minutes of Middle-term Conference
4	Long-term Conference	WP7	CSIC	24	Minutes of Long-term Conference
5	Final Conference	WP7	CSIC	36	D7.5 and Minutes of Final Conference
6	Plan for the Exploitation and Dissemination of Results (PEDR)	WP7	INNCOME	4	D7.4
7	Communication Plan	WP7	INNCOME	4	D7.3
8	Project finished	All	CSIC	36	Evaluation document. All deliverables completed. Results collected, analysed and published/classified.

For an objective verification of milestone accomplishment, a set of KPIs has been also identified. Specific KPIs and indicators will be defined for each WP to assess the minimum requirements of achievement to reach the expected impact of INBOTS CSA. Follow-up and assessment measures will be defined in WP8. The table below provides a preliminary list of these indicators, which are specific to the INBOTS CSA, as well as quantified targets to be measured over consecutive periods of one year (maximum interval between measurements).

#	Key result area	Key performance indicator (KPI)	Y1	Y2	Y3
1	Robotics uptake	Increased participation in R&D&I programmes by both commercial organisations (including SME) and academia.	40%	50%	50%
2	Collaboration /Networking	Working groups and international standardisation institutions linked to INBOTS	40%	80%	100%
3	Transfer of knowledge	Number of conferences/events attended	3	5	7
4	Transfer of knowledge	Number of publications	3	7	10
5	Transfer of knowledge	Number of press releases	1	4	6
6	Transfer of knowledge	Website visitors/month (from month 6 onwards)	500	1000	1000
7	Transfer of knowledge	Number of participant in the INBOTS conference	200	300	400
8	Collaboration /Networking	Number of workshops, summer schools or other events linked to INBOTS	10	10	10
9	Transfer of knowledge	Number of guidelines and reports developed for each WP	1	1	1
10	Transfer of knowledge	Number of posts in social media platforms	24	24	24

4.2. Reporting progress

The INBOTS consortium believes that one of the crucial factors for success in this kind of collaborative project is to maintain an efficient communication flow between the partners. The INBOTS consortium will use a web-based cooperative workgroup tool as a platform for cooperative work documentation. It will be hosted by CSIC.

Reporting is performed on a two-level scheme:

- Three-monthly: The WP leader submits a brief summary progress report (2-3 pages) to the CSA Coordinator. This includes short information about progress, results obtained (e.g. deliverables) and compliance with the work programme.
- Annually: The work package leaders will submit to the CSA Coordinator a summary progress report showing the technical work carried out during the year. The CSA Coordinator will prepare a consolidated annual progress report for the EC. Also, every 12 months the CSA Coordinator will

prepare a consolidated overview of the budgetary situation of the project on the basis of the costs statements from the partners.

The coordinator will submit to the EC technical and financial reports in the following 'reporting periods':

- RP1: from month 1 to month 18
- RP2: from month 19 to month 36

5. Dissemination and exploitation of results

5.1. Dissemination plan draft and guidelines

INBOTS CSA results will be disseminated through various channels outside the consortium in order to raise the public awareness of the project related issues in EU and worldwide. INBOTS CSA dissemination activities will therefore focus on target groups that are directly concerned by the project results:

- Internal dissemination
- Robotic community
- Stakeholders, users and end users (SAB)
- General public
- Governmental and institutional dissemination

Specifically, the dissemination strategy of INBOTS CSA will include:

- - Development of the INBOTS Community
- - Usage of the INBOTS Public Website
- - The Stakeholders, users and end users Advisory Board (SAB)
- - The project SAB and the Project Officer will be regularly informed about the project progress and achievements.
- - Project partners will be strongly encouraged to present their achievements in subject related conferences, workshops, meetings and exhibitions.
- - INBOTS conference: At the end of each year a general multi-track conference that covers all topics of the project will be organized.
- - Moreover, CSIC, as leader of the dissemination tasks, will be in charge of the INBOTS CSA workshops and organization of general communication and dissemination events.
- - Academic partners (universities and other research institutions) will include the results of the project into their educational activities. Links will be established with other research groups involved in similar or related activities in Europe.
- - Project results will be also disseminated in the form of scientific publications targeted at peer-reviewed professional journals.

More information about the Dissemination Plan will be described in 'D7.4. Plan for Exploitation and Dissemination of Results', due in April 2018 (M4).

5.2. Exploitation of project results

INBOTS CSA will take into consideration the potential future exploitation of the project results and the knowhow acquired from the activities developed. Given the nature of CSAs, the outcomes of the project will not result in IPs to be exploited, but in the effective coordination and networking of research and innovation projects, programmes and policies, through the development of accompanying measures, such as standardisation, dissemination and policy dialogues.

The project will allow the industry, policy makers, R&D institutions and other stakeholders and end user partners to explore new areas and collaborations.

More information about the Exploitation Plan will be described in 'D7.4. Plan for Exploitation and Dissemination of Results', due in April 2018 (M4).