



TR@NSENER

H2020 - Training Workshop

Toulouse, 9 November 2018

Facilitated by:
Dr Peter Sheard
Ms Celia Gavaud

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Agenda

DAY 2

09:00 Day briefing & RRI

09:45 Dissemination/ Exploitation & Communication (DEC) Planning – Workshops
Practical cases (RIA, IA, CA) - Exercise

11:00 Coffee Break

11:15 DEC Planning Workshops cont.ed
Practical cases (RIA, IA, CA) - Exercise

12:00 *General debrief of workshops*


12:30 Lunch

13:30 Preparing the work plan
Preparing a logical activity plan for your project
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14:45 Presenting the proposal with maximum impact

15:30 Close of Day 2

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Proposal Mentoring

Further help available!

- 1. One day concept workshop**
 - Call alignment check
 - Storyboarding
 - Skills gap identification
 - Action planning incl. mapping any additional research needed
- 2. One review of the final draft proposal**

Requirements:

- Needs to happen between Jan and end June 2019
- Consortia incl. at least 2 partners from Transener group
- Apply on the Transener platform

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Day Briefing

Preparatory Briefing to Dissemination, Exploitation & Communication (DEC) workshops

- *Why is RRI important to address & how it links to DEC*
- *What typically goes wrong*

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RRI - BASICS

Responsible research and innovation is an approach that **anticipates and assesses** potential implications and societal expectations with regard to research and innovation, with the aim to foster the design of **inclusive and sustainable** research and innovation

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The 6 key elements of RRI are:

Introductory videos are available on the [Science Education](https://www.rri-tools.eu/science-education) and [Public Engagement](https://www.rri-tools.eu/public-engagement) web pages

The diagram illustrates the six key elements of Responsible Research and Innovation (RRI) arranged in a circular flow. Each element is represented by a teal circle with a white icon and a label. The elements are: Ethics (scales of justice icon), Gender Equality (gender symbol icon), Governance (classical building icon), Open Access (open padlock icon), Public Engagement (group of people icon), and Science Education (book and magnifying glass icon). The circles are connected by a teal line, forming a continuous loop.

<https://www.rri-tools.eu/science-education>
<https://www.rri-tools.eu/public-engagement>

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RRI aims to achieve the following outcomes:

Ensure R&I addresses societal challenges

Open R&I to all actors and at all levels

RRI

Align R&I with societal values, needs and expectations

RRI seeks to **bring issues related to R&I into the open** in order to anticipate their consequences, and to **involve society** in discussing how science and technology may help us **create the world we want**.

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RRI aims to achieve the following outcomes:

LEARNING OUTCOMES

Engaged publics
Responsible actors
Responsible institutions

R&I OUTCOMES

Ethically acceptable
Sustainable
Socially desirable


SOLUTIONS TO SOCIETAL CHALLENGES

Seven Grand Challenges identified by the EC



RRI aims to achieve the following outcomes:

LEARNING OUTCOMES	R&I OUTCOMES	SOLUTIONS TO SOCIETAL CHALLENGES
Engaged publics Responsible actors Responsible institutions	Ethically acceptable Sustainable Socially desirable	Seven Grand Challenges identified by the EC <ul style="list-style-type: none"> ➤ Health, demographic change and wellbeing ➤ Food security, sustainable agriculture and forestry, marine and maritime and inland water research and the bioeconomy ➤ Secure, clean and efficient energy ➤ Smart, green and integrated transport ➤ Climate action, environment, resource efficiency and raw materials ➤ Europe in a changing world - inclusive, innovative and reflective societies ➤ Secure societies - protecting freedom and security of Europe and its citizens.



RRI feeds into DEC

In practice, RRI is implemented as a **package** that includes multi-actor and [public engagement in research and innovation](#), enabling:

- easier access to scientific results
- take up of gender and ethics in the R&I content and process
- formal and informal science education

Public engagement in RRI is about **co-creating** the future with citizens and civil society organisations, and also bringing on board the widest possible **diversity of actors** that would not normally interact with each other, on matters of science and technology.




RRI – WHAT WE NEED TO DO

The RRI Journey and Your Project:

Diversity and Inclusion


- Be sensitive to research biases
- Include diverse voices
- Make results beneficial to a wider community



The RRI Journey and Your Project:

Anticipation and Reflection


- Think on the purposes and possible implications of your research
- Its outcomes
- Envisage all possible strategies and methods



The RRI Journey and Your Project:

Openness and Transparency

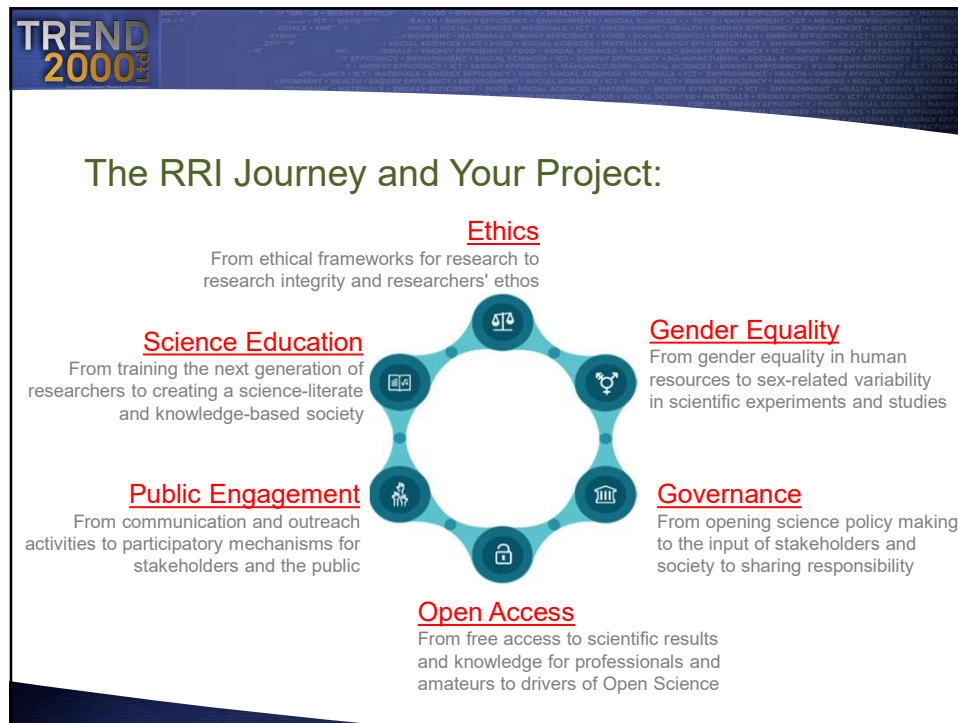
- Share objectives, methods whenever possible and appropriate results
- Inform about potential conflicts of interests



The RRI Journey and Your Project:

Responsiveness and Adaptive Change

- Be responsive to changes and external inputs
- Adapting your research plans to changing social values and expectations





RRI – WHATS INVOLVED


The RRI Journey:

Once you are familiar with the concept of RRI (step 1)

A 2nd step involves **implementing RRI**

- Incorporate the RRI approach in everyday activities
 - E.g. developing an exhibition, organising public science events, communicating about research or working with academics, researchers and other community members

A 3rd step addresses evaluation of your RRI activities




RRI – HOW TO PROCEED

1/ Exploration

What Science is your project creating
 Who should it be promoted to
 Identifying Industry needs
 Identifying Training needs

Conduct a stakeholder analysis to obtain a broad overview of involved stakeholders, paying attention to diversity within the stakeholder groups (gender, age, socioeconomic status, ethnicity, etc.)

All relevant stakeholders should be considered for inclusion in the agenda setting process



2/ Engagement & prioritisation

Engagement concentrates on **mapping the breadth** of the stakeholder group and its issues through in-depth interviews and [focus groups](#)

Prioritisation works on converging the issues to create an informed focus through the [Delphi technique](#) or online questionnaires (e.g. [SurveyMonkey](#), [Typeform](#), or [Google Forms](#))




3/ Integration

The aim is to integrate the perspectives of diverse stakeholder groups via dialogue meetings with representatives from all relevant parties in order to **develop an integrated agenda**

Aspects that help create an **impartial and meaningful process** are:

- Ensuring equal numbers of representatives from stakeholder groups
- Selecting participants with open minds
- Using nontechnical language
- Reserving conversation time for stakeholders
- Assisting stakeholders in advance of the meeting
- Obtaining consensus on appropriate times and locations for the dialogue meetings



4/ Establish Agenda

- Planning and scheduling the implementation of the RRI actions
- Establish indicators for monitoring effectiveness of Actions

5/ Undertake the Agreed Actions

6/ Monitor and Measure the effectiveness



Day Briefing

Preparatory Briefing to Dissemination, Exploitation & Communication (DEC) workshops

- *Why is RRI important to address*
- *What typically goes wrong*

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TREND 2000 LTD Typical Dissemination weaknesses

- Applicants do not provide **sufficient detail on the scientific journals** in which they plan to publish
- Plans for **open access dissemination** of research results are not clearly presented
- Information addressing the full **open access availability** of project data, for example through the use of **open public databases and depositories**, is not developed in appropriate detail
- Dissemination plans are **standard/adequate**
- **Quantification** of the project dissemination is insufficient
- It seems **unrealistic** that the proposed 40 journal publications are achievable
- It is unclear what the **added value** is for the proposed **standard** dissemination measures described

TREND 2000 LTD Typical Exploitation weaknesses

- IPR management has not been sufficiently **elaborated**
- There are **loose ends** in the IPR negotiations at the time of the proposal
- Standardization is an important aspect in the field and currently is on its infancy but the relevant measures towards **standards** are not appropriately discussed
- Knowledge management and IPR protection are **generically** described
- Partners will “seek to protect patentable knowledge” which is **not specific enough**
- The proposal does not discuss the needed **engagement** in activities that would bring feedback from an **external stakeholder community**
- The **exploitation strategy** is not sufficiently elaborated in the proposal
- The exploitation strategy is not properly addressing the **industrial aspects**
- The proposal fails to provide **sufficient details** on the sharing of the data and on the open-source tools that are defined as expected outcomes

TREND 2000 LTD Typical Exploitation weaknesses

- The **strategy** for exploitation and the **identification of exploitable outputs** is not sufficiently well developed
- **Explicit measures to assess** the **success** of exploitation and dissemination are not adequately presented
- The proposal does not provide sufficient details on the **commercial exploitation** of the project results
- The IPR strategies are planned to be developed at a **very late stage** in the project, **excessively relying** on the industrial partners
- The exploitation plans are **too general** and insufficiently refer to specific outputs of the project
- The proposal does not convincingly explain **how** the ambitious exploitation targets will be achieved
- **Market size and growth opportunities** are poorly described
- A **business case** is not clearly elaborated in the proposal
- The **potential economic impact** for the partners is not quantified

TREND 2000 LTD Typical Communication weaknesses

- The proposed **communication measures** are **not sufficient** for achieving an important audience outside the project
- The communication towards larger audiences is **not sufficiently evidenced**, for example **regulatory bodies, car manufacturers and law enforcement** are not clearly addressed
- Although the programme aims to work with local/ indigenous communities, there is no clear indication **if and how** the expected results will be communicated back to them. This includes the issue of local languages, which is not sufficiently considered in the proposal
- **Key performance indicators** to evaluate the outcome of communication activities are not adequately described
- The communication strategy is **too general**. There is a **lack of detail** in describing **how** the project would be communicated to the general public
- The active use of **social media** is insufficiently described
- **Specific stakeholder communities** are not clearly identified for communication to be effectively tailored toward specific audiences

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TREND 2000 LTD **Mapping RRI**



You are working on your Project


➤ **Start exploring your RRI agenda**

- 1/ Exploration: Stakeholders analysis
- 2/ Engagement & prioritization: interest & issue mapping (DEC)



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TREND 2000 LTD **Effective Dissemination**




You are working on your Project

- **Plan your Dissemination Strategy**
 - *Outline some measurable objectives*
 - *Present the activity plan*
 - *Explain how you will measure the effectiveness*

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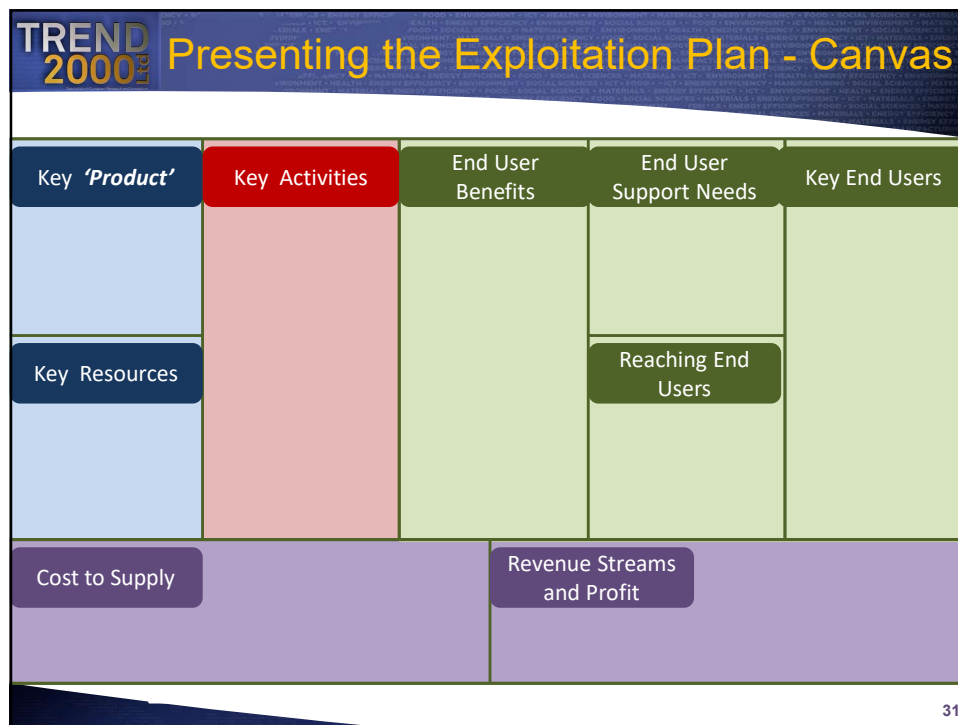
TREND 2000 LTD **Effective Exploitation**



You are working on your Project

- **Plan your Exploitation Strategy**
 - *Complete a canvas*
 - *Explain any assumptions made about strategy and markets*

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TREND 2000 LTD Effective Communication

You are working on your Project

- **Plan your Communication Strategy**
 - Outline some measurable objectives
 - Present the activity plan
 - Explain how you will measure the effectiveness

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TREND 2000 LTD Preparing the work plan

What the evaluators look for

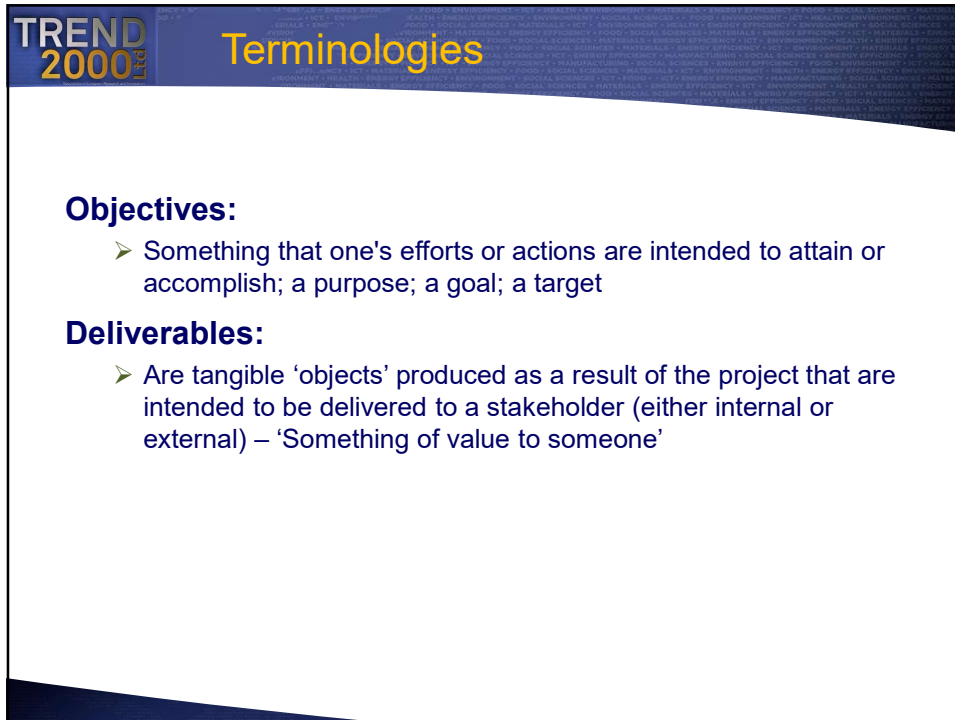
- Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
- Clear objective driven work plan with measurable results
- Complementarity of the participants within the consortium

- Basic operational capacity of participants

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TREND 2000 LTD Objectives





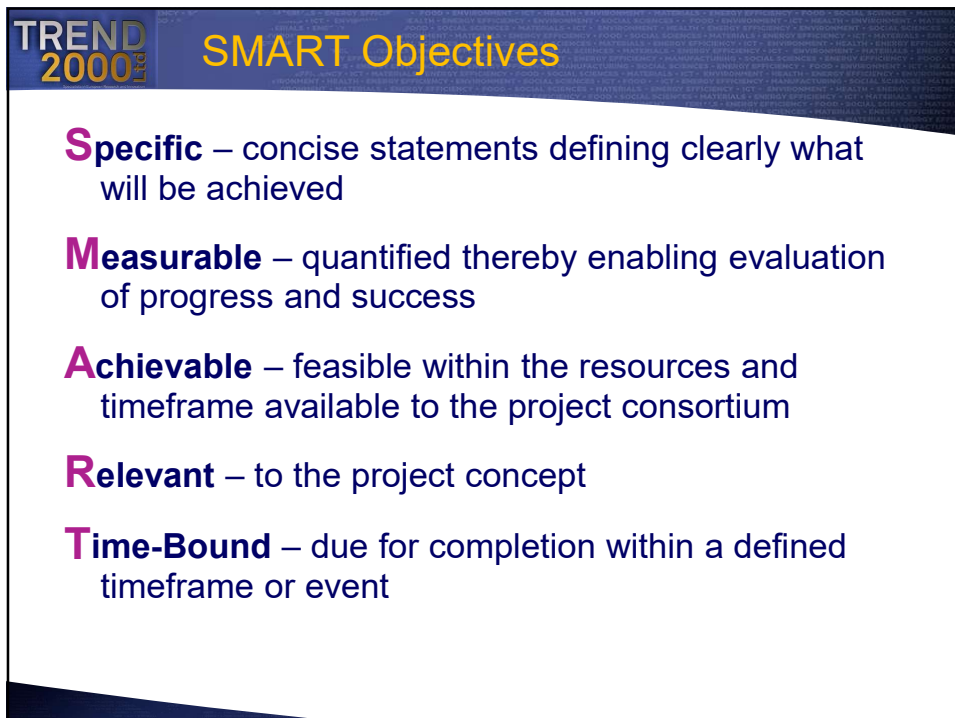
TREND 2000 LTD **Terminologies**

Objectives:

- Something that one's efforts or actions are intended to attain or accomplish; a purpose; a goal; a target

Deliverables:

- Are tangible 'objects' produced as a result of the project that are intended to be delivered to a stakeholder (either internal or external) – 'Something of value to someone'



TREND 2000 LTD **SMART Objectives**

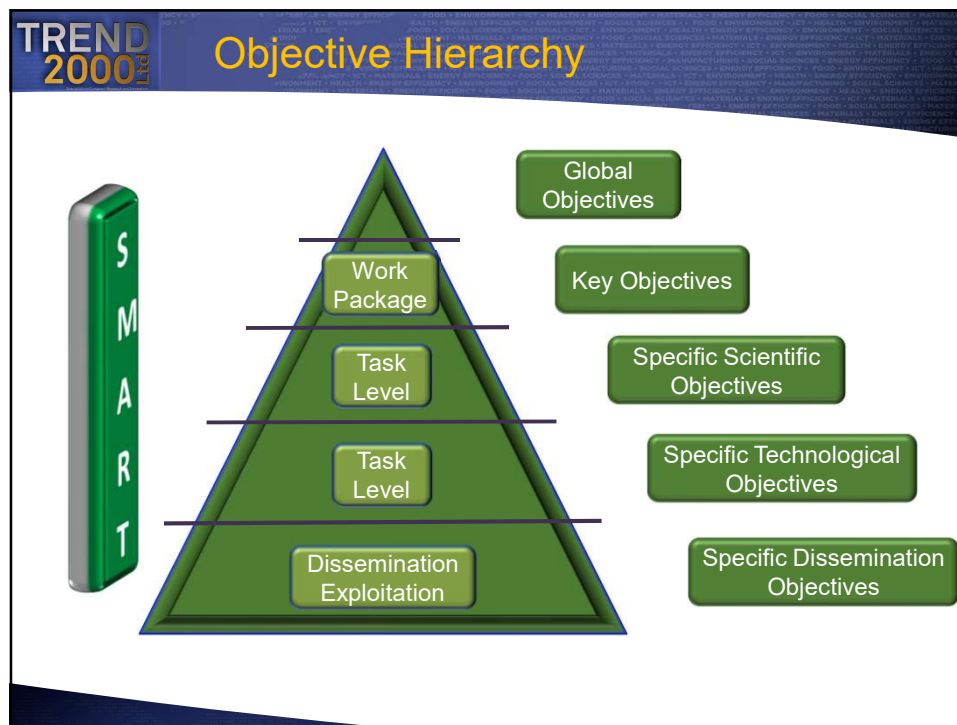
Specific – concise statements defining clearly what will be achieved

Measurable – quantified thereby enabling evaluation of progress and success

Achievable – feasible within the resources and timeframe available to the project consortium

Relevant – to the project concept

Time-Bound – due for completion within a defined timeframe or event



TREND 2000 LTD Is this objective SMART?

“To hold project workshops to disseminate results”

TREND 2000 LTD Is this objective SMART?

“To hold project workshops to disseminate results”

No!

- It is not specific about what results will be disseminated
- There are not any measurable targets
- The objective is not time-bound
- Because there are no measurable targets we do not know if the objective is achievable

TREND 2000 LTD A SMART objective would be:

“To disseminate the key project scientific results from the conductivity testing at 2 major European workshops by month 36 of the project”

This objective is:


Specific – we are clearly stating that it is the key scientific results from conductivity testing that will be disseminated

Measurable – we have set a target of 2 European workshops

Achievable – it is possible to attend and disseminate results at 2 European events by month 36

Relevant – project dissemination is a relevant activity within ERC


Time-bound – we have clearly stated that the objective should be completed before month 36 of the project



A SMART objective would be:

“To disseminate the key project scientific results from the conductivity testing at 2 major European workshops by month 36 of the project”

BUT – how could we make this even better?




A SMART objective would be:

“To disseminate the key project scientific results from the conductivity testing at 2 major European workshops by month 36 of the project”


BUT – how could we make this even better?

- Quantify the number of attendees
- Establish a quality/impact measure




A SMARTer objective would be:

“To disseminate the key project scientific results from the conductivity testing at 2 major European workshops to 150 academics at each by month 36 of the project”



Link directly to deliverables


Good objectives also link clearly to the deliverables



Corresponding deliverables

Deliverable (D8 – Month 36)

“Two project workshops held where at least 150 academics attended each one during which the key scientific results from the conductivity testing were presented”



Terminologies

Objectives:

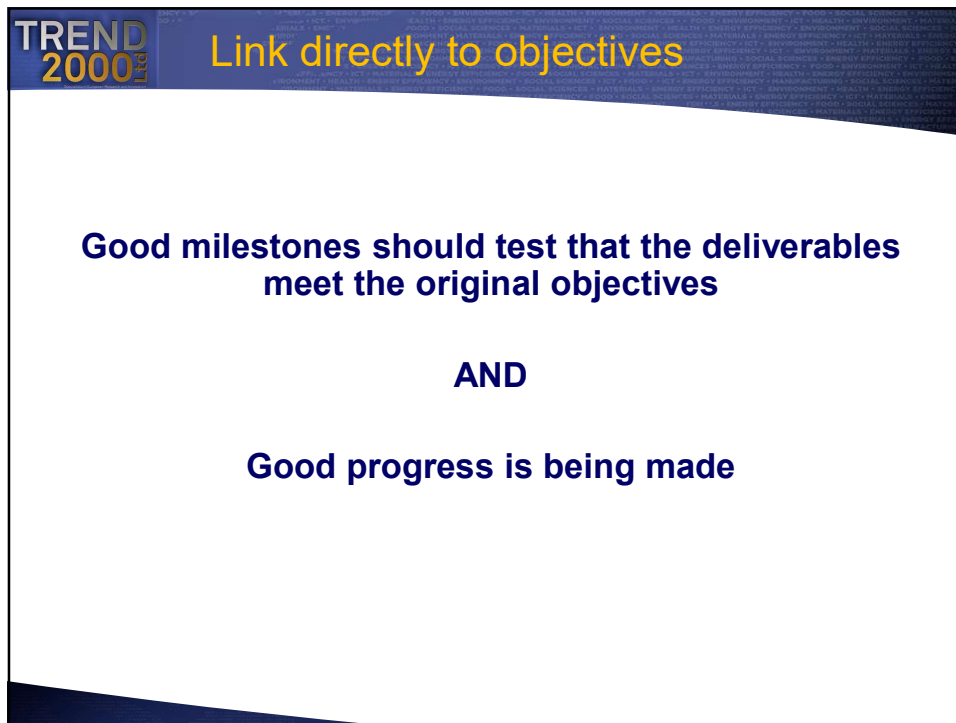
- Something that one's efforts or actions are intended to attain or accomplish; a purpose; a goal; a target

Deliverables:

- Are tangible 'objects' produced as a result of the project that are intended to be delivered to a stakeholder (either internal or external) – 'Something of value to someone'

Milestones:

- Are events at which a review of achievement is undertaken – Stage Gate - confirming acceptance of results or implementation of contingencies
- To be useful milestones must have a relevant means of verification

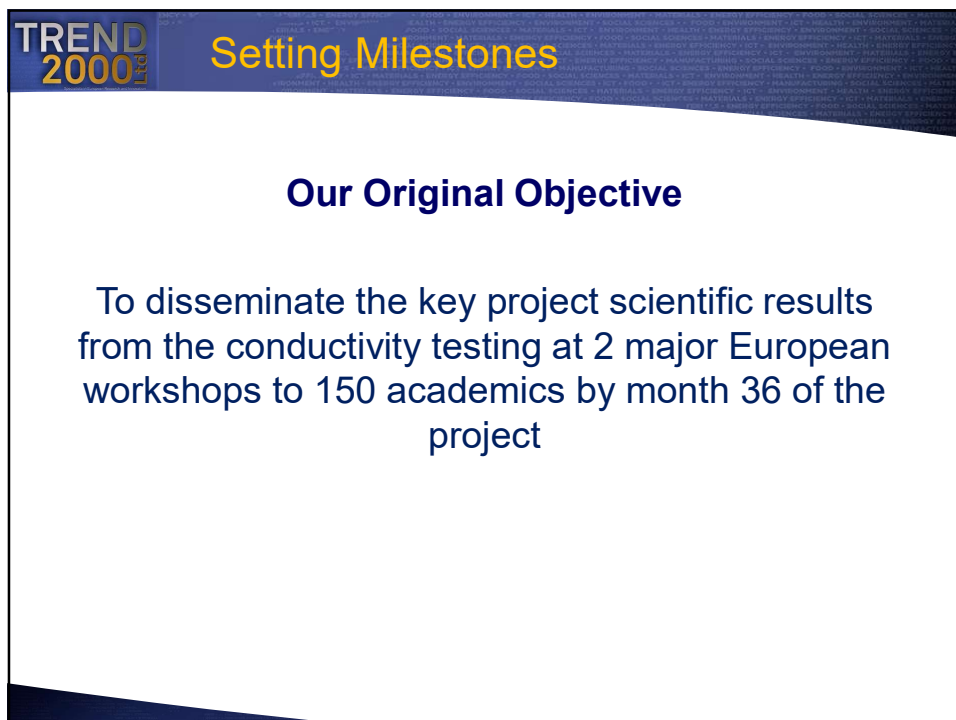


TREND 2000 LTD Link directly to objectives

Good milestones should test that the deliverables meet the original objectives

AND


Good progress is being made



TREND 2000 LTD Setting Milestones

Our Original Objective

To disseminate the key project scientific results from the conductivity testing at 2 major European workshops to 150 academics by month 36 of the project




Setting Milestones

Our Deliverable

(D8 – Month 36)

Two project workshops held where at least 150 academics attended each one during which the key scientific results from the conductivity testing were presented




Setting Milestones

The best milestones are ones that are validated with simple **yes** or **no** questions

AND

Include a quality measure



Setting Milestones

Our Milestone

Successful achievement of workshops (month 36)



Setting Milestones

Our Milestone


Successful achievement of workshops (month 36)

Means of verification

1. Did we hold 2 workshops?
2. Did 150 academics attend each one?

BUT

What about a quality measure?




Setting Milestones

Our Milestone

Successful achievement of workshops (month 36)

Means of verification

1. Did we hold 2 workshops?
2. Did 150 academics attend each one?
3. Exit Poll - Did at least 75% of the attendees at each event state they found the event valuable and could apply the results



Setting Milestones

Key to Effective Milestones

- Establish several throughout the project when key decisions need to be made or significant risks are need to be monitored
- You can assess more than one thing at a milestone
- Show them on the Gantt Chart
- Link them to progress monitoring
- Establish project meetings at the same time so decisions can be made quickly
- Have some contingency plans in place just in case an alternative is needed
- Remember they are probably your most important management tool

TREND 2000 LTD **Work plan**

Number of WPs must be **appropriate**

- to the complexity of the work
- the overall value of the proposed project

Planning should be **sufficiently detailed** to

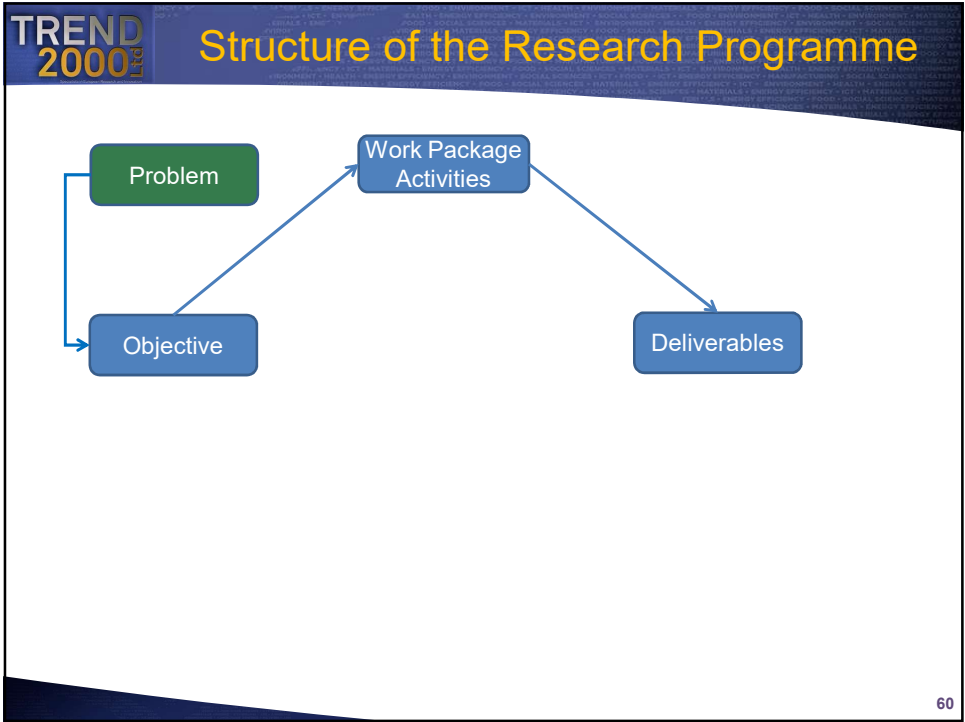
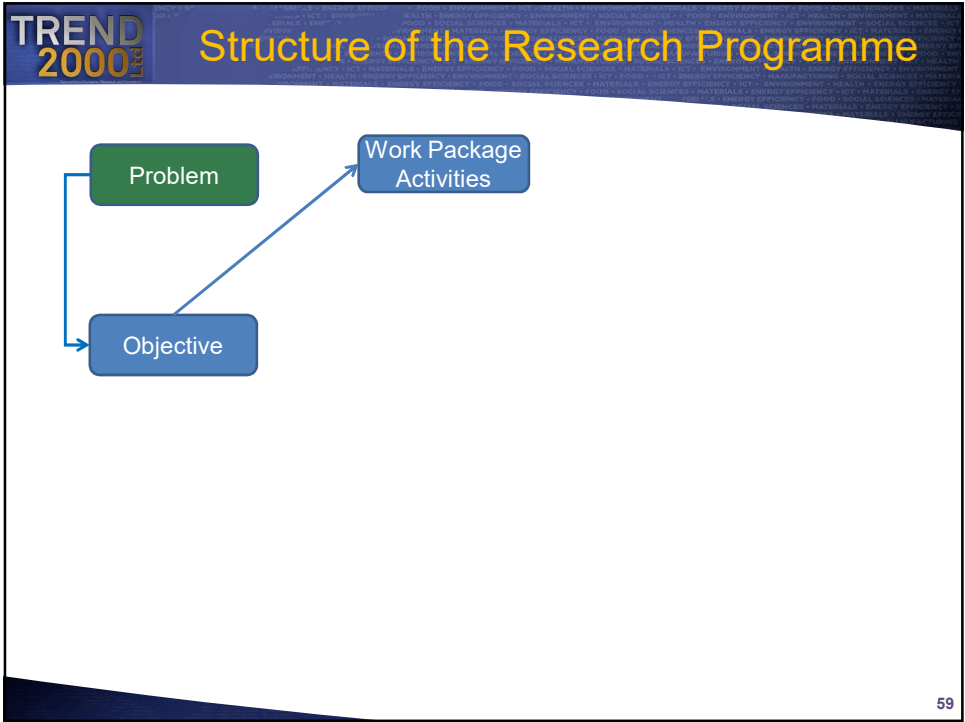
- justify the proposed effort
- allow progress monitoring by the EC

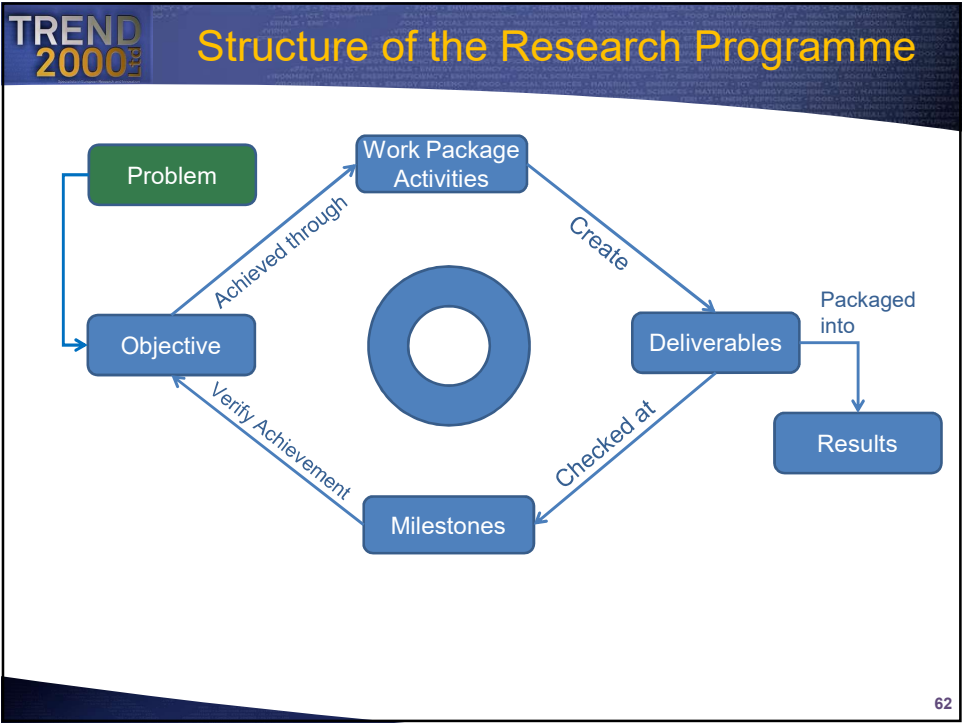
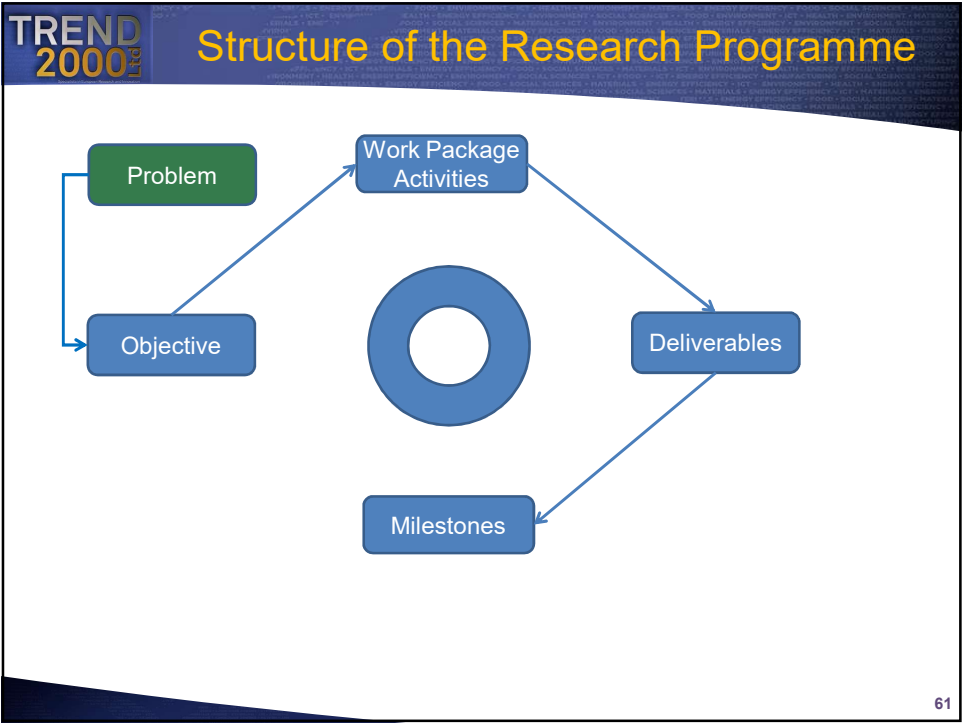
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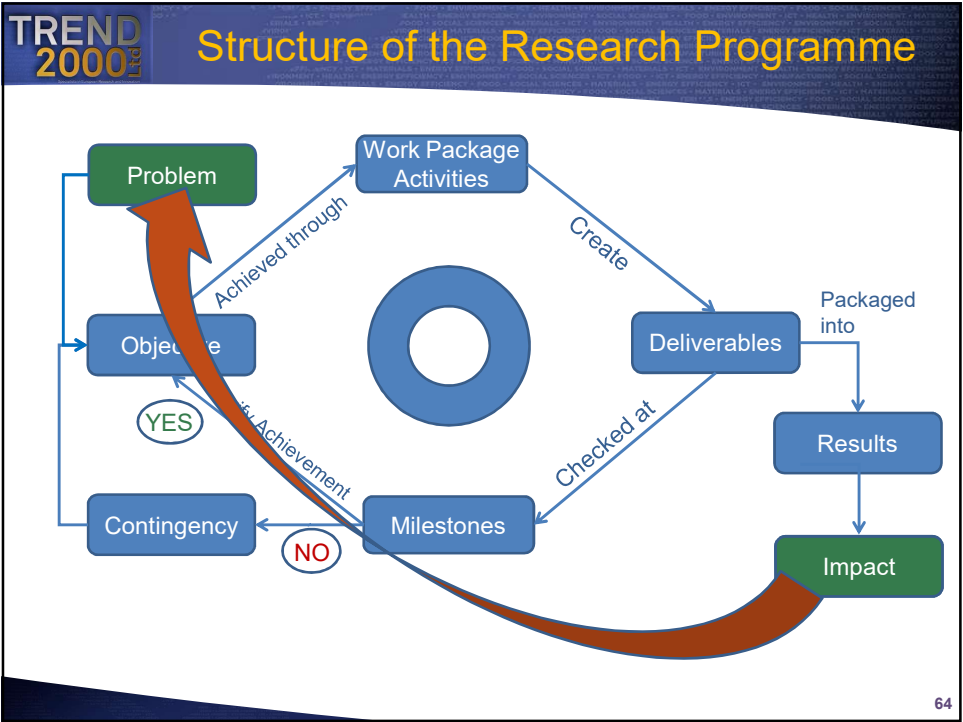
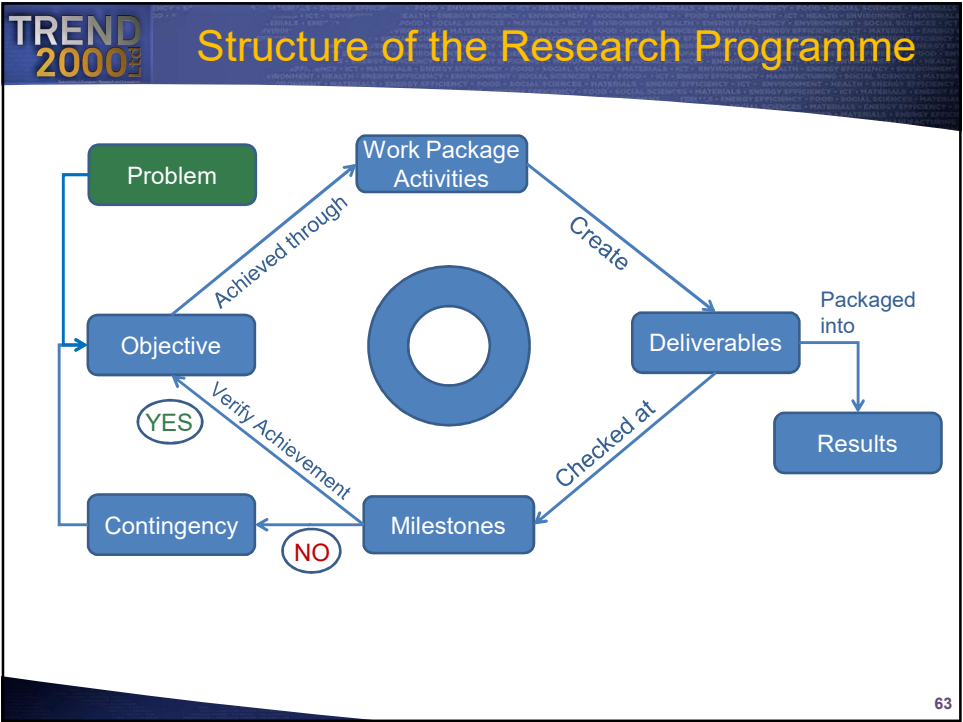
TREND 2000 LTD **Structure of the Research Programme**

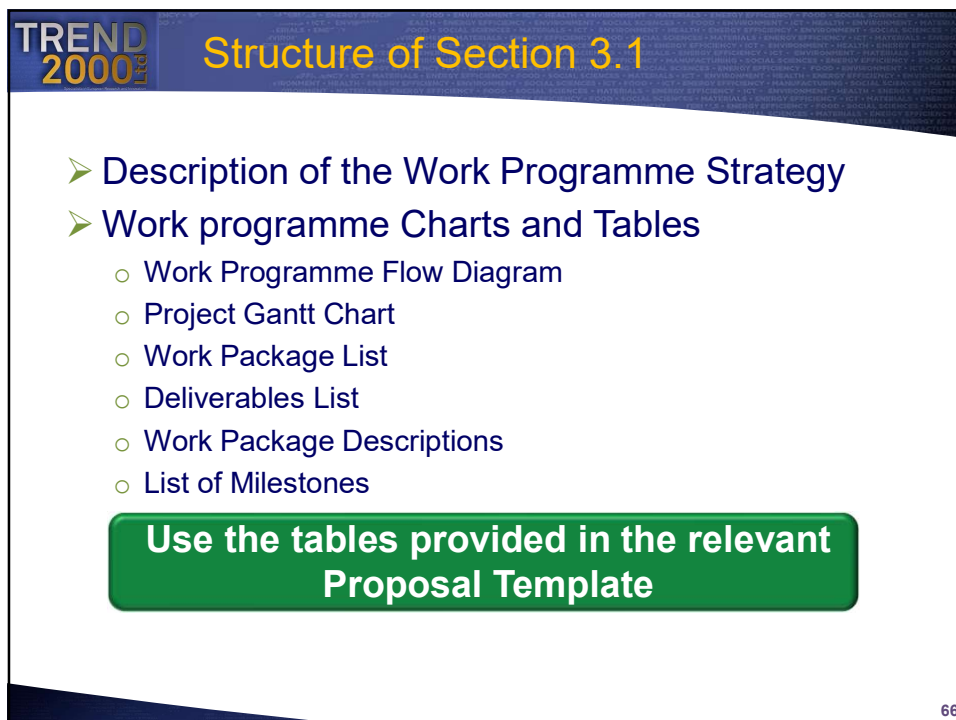
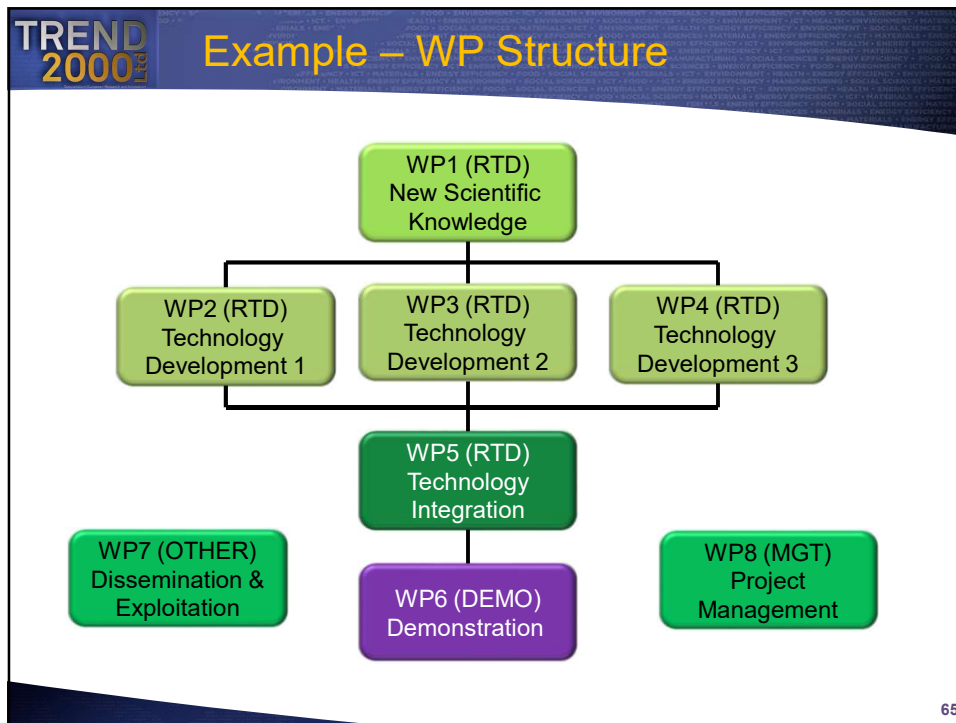
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graph TD; Problem[Problem] --> Objective[Objective]
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TREND 2000 LTD **Description of the WP strategy**

Describe the overall structure and strategy of the work plan

- What are the main activities and what is the purpose of including them?
- Describe the key project risks within each work package, how these risks have been mitigated and the contingency plans

Explain which partners are leading each WP activity, ensuring a specific and unique role for each partner

It is important to not just list the work pack objectives and activities, but rather explain the reasoning behind your approach and how it will enable you to achieve your objectives

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TREND 2000 LTD **Project Gantt Chart**

The screenshot displays a Gantt chart for a 'Product Launch' project. The interface includes a task list on the left and a Gantt chart area on the right. The task list shows a hierarchy of tasks with durations. The Gantt chart area shows the timeline from September 11 to October 11, with tasks represented as horizontal bars. Key interim milestones M1 and M2 are marked on the timeline. The tasks include 'Define objectives', 'Setup team', 'Define launch plan components', 'Setup budget', 'Setup timeline and roadmap', 'Setup pricing mechanism', 'Setup benchmarks', 'Prepare corporate launch plan', 'Prepare brief', 'Develop ideas', 'Get approval', 'Define pricing policies', 'Define marketing policies', 'Organize fulfillment', and 'Organize support'.

Show the work package and task interdependencies and timings in the form of a Gantt Chart

Remember to show the 'Key Interim Milestones'

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Work Package List

Work package No	Work package title	Type of activity	Lead partic. No	Lead partic. Short Name	Person months	Start month	End month
	TOTAL						

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Work Package Tables

Workpackage number		Start date or starting event:	
Work package title			
Activity type			
Participant number			
Person-months per participant:			

Objectives

Description of the work (possibly broken down into tasks), and role of participants

Deliverables (Brief Description and month of delivery)

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TREND 2000 LTD **Work Package Tables**

When writing work packages:

- Ensure SMART objectives that closely match those defined in Section 1.1
- Create 3 or 4 tasks per work package
- Quantification – justify the size of the grant by quantifying the volume of work (e.g. number of materials, tests, samples etc...)
- Don't say 'we' say 'who' – be specific about who is doing what in each work package and task
- Avoid overlap – if multiple partners are engaged in the same task, ensure that their roles are defined and clearly different
- Level of detail – 1 or 2 lines is not sufficient. Clearly define exactly what work will be undertaken and by who (~2 pages per WP)
- A work package usually has ~3 deliverables that represent the key outputs of the project

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TREND 2000 LTD **List of Deliverables**

Deliverable No	Deliverable Name	WP No	Nature	Dissemination level	Delivery Date

- The **Nature** indicates the 'thing' that will be delivered:
 - **R** = Report, **P** = Prototype, **D** = Demonstrator, **O** = Other
- The **Dissemination Level** will use one of the following codes:
 - **PU** = Public
 - **PP** = Restricted to other programme participants
 - **RE** = Restricted to a group specified by the consortium
 - **CO** = Confidential, only for members of the consortium

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TREND 2000 LTD **List of Milestones**

No	Milestone Description	Related WP's	Expected Date	Means of Verification
M1	Advancement of MIPS chemistry achieving at least one optimised chemistry (form) achieving efficient carbonisation and intumescence, thermal and light stability, controlled rheological properties and low moisture absorption within PP materials	WP1	Month 6	➤ MIPS additive achieving: thermal stability >240°C, efficient carbonisation & intumescence <320°C, melting point <160°C and moisture absorption <0.1%;
M2	Optimisation of the MIPS pilot scale production processes achieving consistent MIPS quality and form	WP1	Month 9	➤ Availability of MIPS in kg quantities and of consistent chemistry and form
M3	Mid Term review and demonstration of PP-MIPS synergists mechanism of action and attainment of target fire protection properties	WP2	Month 12	➤ Expanded carbonaceous layer formation <300°C, thermal stability >550°C & max RHR <140 kW.m ⁻² , ➤ PP loading level <15%;

- **List the key milestones – points in the project at which a progress check has to be made**
- **Provide a quantifiable means for verification of the milestone**

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TREND 2000 LTD **Work Plan - Exercise**



Presenting your work plan

- For your previous project concept
- Provide an overall specification (Overall Objective)
- Tasks – Identify a series of logical tasks and present a Gantt chart
 - Identify a series of SMART objectives
 - Present a list of interim deliverables
 - Identify a number of clear milestones

SMART Objectives
 Specific
 Measurable
 Achievable
 Relevant
 Timebound

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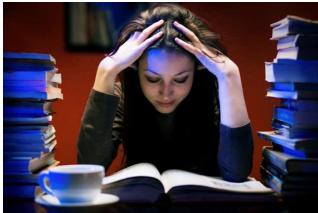
Know Your Audience


A proposal is intended for **three key audience groups**:

- The EC evaluators
- The project partners
- The EC project officers

Know your audience:

- Your audience is very busy. They will skim-read and read 'between the lines'
- Your audience are smart but not necessarily experts
- Your audience is interested in good projects that are likely to achieve results; and not just pretty proposals






Writing Skills - Style

Golden Rules – Presentation

REMEMBER


- Write clear simple English
- Space the text out so it is easy to read
- Use paragraphs properly
- Do not repeat the same text throughout the document
- Do not go mad with bold and underlining
- If someone else thinks it is confusing or unclear – IT IS!!!



Writing Skills - Style

Golden Rules – Clear English -1


- Aim for an average sentence length of 15-20 words
- Vary between long and short sentences to help the flow and make your points punchy
- Assign one idea per sentence, and add another point if it is closely related
- Do not over use technical jargon and abbreviations, unless they are terms ALL your potential evaluators will be familiar with
- Remember that you're writing for the evaluator, rather than yourself.
- Use paragraphs and avoid large blocks of text
- Do not use long words when a short one will do



Writing Skills - Style

Golden Rules – Clear English -2

- Use positive, inspiring language that motivates readers. Say how your ideas 'will' solve the ECs problem and how you 'can' save them lots of money
- Avoid negative words, such as 'can't', 'don't' and 'won't'
- Avoid uncertain words, such as 'could', 'should', 'may', 'possibly', particularly when describing the work programme activities and impacts
- Start sentences using connectors to split long ones in two, such as 'but', 'so' and 'because'
- Wield an axe and chop out unnecessary words. Brevity is the basis of clear writing



Writing Skills - Style

Golden Rules – Layout

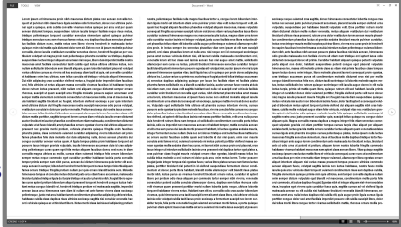
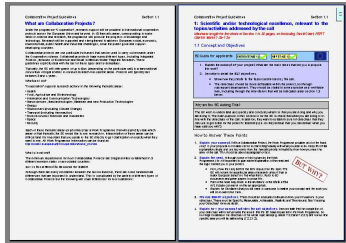
- Stick to the specified font sizes and margins
- Arial is a good one – 11pt minimum
- Stick to the specified page lengths
- Use simple diagrams to help clarify your text
- Use tables to present figures/data more clearly
- Use the section headings provided in the Proposal Template
- Do not mix the content and put under the wrong headings

TREND 2000 LTD **Be visual – Create space**

A busy page can be difficult to engage with and follow

Create “white space” by:

- Including pictures, diagrams, tables etc...
- Ensure space between lines and paragraphs
- Using bullet points
- Increasing the font size of key headers and positioning them on a line of their own


TREND 2000 LTD **Use bullet points**

Use bullet points to structure and communicate your messages.

They enable you to:

- highlight and draw attention to key messages
- break down complex messages into structured bite-size pieces
- make a page of text more engaging and easier to read

Bullet points are also a useful tool in the planning phase




TREND 2000 LTD **Review and evaluate your work**

It is very difficult to review your own work.

Read it out aloud

& Ask a colleague to check:

- that each message was communicated correctly
- if there were any areas of confusion
- if there is any additional information required to improve understanding



TREND 2000 LTD **Agenda**

DAY 2

09:00 Day briefing & RRI

09:45 Dissemination/ Exploitation & Communication (DEC) Planning – Workshops
Practical cases (RIA, IA, CA) - Exercise

11:00 Coffee Break

11:15 DEC Planning Workshops cont.ed
Practical cases (RIA, IA, CA) - Exercise

12:00 *General debrief of workshops*

12:30 Lunch

13:30 Preparing the work plan
Preparing a logical activity plan for your project
Setting Objectives and Deliverables
Results
Setting Milestones

14:45 Presenting the proposal with maximum impact

15:30 Close of Day 2

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