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Log of Changes

Deliverable N° & Version N°	**Date** (dd/mm/yyyy)	**Changes**
D5.2 V1.0	30/05/2008	None – First version released to the Commission.

1. Summary

The Project Quality Plan (PQP) is a handbook designed to guide the BELIEF-II project participants through all aspects of the project's management and to state, track and monitor the quality of the work produced by the project.

It is to serve as a reference tool as it brings together all of the procedures and policies that have been agreed upon since the beginning of the project by the Project Coordinator, the Partner Managers and the Work Package Leaders.

A Quality Manager (QM) - nominated among project's members - is in charge of the proper design, update and application of the PQP.

The QM establishes guidelines, rules, procedures and metrics for quality assurance and is supported by a Project Quality Board (PQB). The PQB will meet at least in conjunction with the PMB meetings.

The PQP covers both the process and the products, as well qualitative and quantitative quality characteristics, and includes a Risk Management section with the identification of contingency ad recovery plans. It also defines the internal review process to be applied to the different types of achievements and deliverable results (i.e. reports, specifications, evaluation of results etc.). Standard structure and formats for the various classes of documents that will be produced in the context of the project are also defined in this QP.

All project's documents referenced in this PQP can be found and accessed by authorised partners at http://bscw.research-infrastructures.eu/bscw/bscw.cgi/66523.

2. Introduction

2.1. Purpose and Intent

Rigorous control mechanisms are in place for BELIEF-II. This rigor should be exercised in all aspects or our project, from internal meetings to external project presentations.

In having a clear set of guidelines by which the project is measured, we can ensure better collaboration as work package leaders, those who are closest to the technical work, learn to communicate their progress and challenges to management and other cross-cutting activity leaders and committees with efficiency. By having a clearly defined internal review procedure for deliverables, we can ensure that the entire consortium is responsible for and engaged in the work that is produced by the project. Furthermore, policies which help define the image BELIEF-II presents to the rest of the world today, through presentations and publications, contribute to establishing a reputation for high-quality research and will eventually lead us toward the definition of a BELIEF-II brand.

This handbook was designed to guide the BELIEF-II project participants through all aspects of the project's management. It is to serve as a reference tool as it brings together all of the procedures and policies that have been agreed upon at the beginning of the project by the Project Coordinator, the Work Package Leaders and the Project Management Board. Some of the items are strategically important in nature, while others answer to day-to-day complications that could arise during the project's timeframe.

The Project Quality Plan is a dynamic document and will be updated accordingly, and at the very minimum one time per year. As with all of our project documentation, the handbook will be made available on BELIEF-II's Digital Library and BSCW [BSCW] shared workspace.

2.2. Terms and Abbreviations

Following please find a list of terms and their abbreviations used alternately in this handbook, and throughout the project in general. The selection of a particular term for use depends a great deal on the context of its usage, as well as the habits or prior experience of the people involved in the project.

- BELIEF-II = Project = Consortium
- Project Manager (PM) = Coordinator
- Deputy Project Manager (DPM)
- Quality Manager (QM)
- Description of Work (DoW) = Technical Annex (TA) = Annex I
- BSCW = Shared workspace = Project workspace (http://bscw.research-infrastructures.eu/bscw/bscw.cgi/66523)
- DL = Digital Library
- PMB = Project Management Board
- PQB = Project Quality Board
- QR = Quarterly Report
- Month 1 = M1 = April 2008
- Month 12 = M12 = March 2009 = End of first reporting period
- Month 24 = M24 = March 2010 = End of second reporting period

3. Meeting Procedures

For detailed information on the project's governing bodies or meeting procedures, please refer to the DoW [DoW] and the Consortium Agreement [CA].

3.1. Project Management Board

The Project Management Board (PMB) is the BELIEF-II consortium's strategic coordinating and decision-making body.

- **Constitution**: The PMB is comprised of 9 members, i.e. the Project Manager, the 7 Partner Managers and the Quality Manager. Each member will have one vote.
- **Substitutes/Replacements**: Any partner may, by notice in writing to the Coordinator, at any time, nominate a temporary substitute representative or a permanent replacement representative.
- **Third parties**: The PMB may invite third parties external to BELIEF-II as well as partners participating in the project to attend any meeting of the PMB in order to provide comments or advice. The third party will not be entitled to vote at any such meeting. Any such third party shall sign an undertaking of confidentiality.
- **Chairperson**: Is the Project Manager. In case of absence of the Project Manager a delegate appointed by the same should serve as Chairperson. The Chairperson has a casting vote in cases of equal votes.
- **Frequency**: No less than once in every two month period. One meeting per every six month period will take place in person, while the other meetings may take place in person or by teleconference. A majority of partners may request a meeting by notice in writing to the Coordinator.
- **Notice**: The Chairperson must provide at least 7 days (for teleconferences, 30 for in-person meetings) written notice (including an agenda) of the date and venue.
- **Quorum**: At least 6 out of 9 members must be present (physically, by telephone or by electronic means) in order to validly convene a meeting.
- **Voting**: Most matters for consideration and decision may be decided by a majority of 2/3 of those members present and entitled to vote. Unanimous vote is required for matters concerning:
    - Admission of additional parties into the consortium
    - Project Plan
    - Allocation of the budget
    - Removing/replacing a person on the PMB
    - Reallocating the work of a "Defaulting Party"
    - Termination of the EC contract
- **Minutes**: The Project Manager will prepare and forward a draft version of the minutes to the members of the PMB for validation within 10 calendar days from any PMB meeting. With the approval of the members and anyway within 15 calendar days from the said meeting, the minutes will be approved.

3.2. Project Quality Board

The Project Quality Board (PQB) is the BELIEF-II consortium's decision-making body in charge of the definition of guidelines, rules, procedures and metrics for quality assurance.

- **Constitution**: The PQB is comprised of the Quality Manager (chairing), the Coordinator and the WP leaders. Each member will have one vote.
- **Substitutes/Replacements**: Any partner may, by notice in writing to the Coordinator and the QM, at any time, nominate a temporary substitute representative or a permanent replacement representative.
- **Third parties**: The PQB may invite third parties external to BELIEF-II as well as partners participating in the project to attend any meeting of the PQB in order to provide comments or advice. The third party will not be entitled to vote at any such meeting.
- **Chairperson**: Is the Quality Manager. In case of absence of the Quality Manager a delegate appointed by the same should serve as Chairperson. The Chairperson has a casting vote in cases of equal votes.
- **Frequency**: The PQB will usually meet in conjunction with the PMB, with the same rules. A majority of partners may request a meeting by notice in writing to the QM.
- **Notice**: The Chairperson must provide at least 7 days (for teleconferences, 30 for in-person meetings) written notice (including an agenda) of the date and venue.
- **Quorum**: At least 3 out of 4 members must be present (physically, by telephone or by electronic means) in order to validly convene a meeting.
- **Voting**: Most matters for consideration and decision may be decided by a majority of 2/3 of those members present and entitled to vote. Unanimous vote is required for matters concerning:
    - Project Plan
- **Minutes**: The Project Manager will prepare and forward a draft version of the minutes to the members of the PMB for validation within 10 calendar days from any PMB meeting. With the approval of the members and anyway within 15 calendar days of the said meeting, the minutes will be approved.

4. Cooperation Tools

4.1. BSCW Workspace

Everyone participating in the BELIEF-II project (including administrators) is given web access to the project's shared workspace BSCW.

The URL for the workspace is http://bscw.research-infrastructures.eu/bscw/bscw.cgi/66523.

The BSCW is managed by CNR-ISTI. For any request related to BSCW, please send an email to the QM (franco.zoppi@isti.cnr.it).

At the top-level of the BELIEF-II BSCW you will currently find folders for:

- Calendar of BELIEF-II
- Contractual documents (includes the EC contract, Description of Work, Consortium Agreement, etc.)
- Deliverables: "Under review" and "Submitted to the EC"
- Meetings & Phone Conferences (includes agendas and minutes)
- Project Quality, with documents showing reviewers assignments, persons allocation and this Project Quality Plan
- Public material (deliverables, publications, brochures, etc.) linked to the project Portal and to the DL
- Reports & Reviews
- Templates & Material (Microsoft Word ad Power Point templates produced for deliverables and presentations and other basic files that have to be used as a model for writing other documents)
- Work packages (one folder per work package)

4.2. Mailing Lists

Mailing lists are managed by the Coordinator. The following mailing lists have been currently defined:

- info@beliefproject.org
  This email address refers to the user support team managed by the Coordinator and is an internal Metaware address. It is used by external users as main communication tool with the project to get information and support related to the project activities and any inquiry related to the website.
- coordinator@beliefproject.org
  This email address is used by the Commission for communications to/from the project and is read by the Project Coordinator, the Project Manager and the Coordinator support staff at Metaware.
- belief2-partners@metaware.it
  This mailing list contains the email address of all the members of the Consortium. It is used for all inter-partners communications. External communications may reach this address upon approval of the mailing list administrator and moderator.

For mailing lists' members please refer to "Appendix B – Project Bodies and Roles".

How-to: Request subscription or deletion from a mailing list

The partners email addresses have been inserted automatically to this list. To request a new subscription to the partners mailing list or to be deleted from this mailing list, as well as to change the password and change the settings, partners must follow the instructions in the mailing list administration panel at:

http://server.metaware.it/mailman/listinfo/belief2-partners

For any further information or support, partners can contact the mailing list administrator at t.lombardo@metaware.it.

Please be sure that your incoming and outgoing email addresses are the same.

IMPORTANT NOTICE

Project participants are encouraged to watch for signs of mail rejection and be rigorous about verifying that any changes in their mailing address are communicated to the mailing list administrator. It often happens that participants have an outgoing mail address which does not match the incoming mail address and this situation can cause problems in sending/receiving electronic mail.

4.3. Expressing Preferences

For quickly gathering preferences among partners to schedule an event such as a board meeting, conference call, or any other group event or to make a choice among travel destinations, an agenda, or among any other selection, the Doodle [Doodle] utility will be used. Doodle is an extremely easy to use web utility, completely free, allowing any partner to create a “pool” to propose an idea, invite participants and cast their vote.

Doodle will be used by the PM and the QM to agree upon PMB and PQB meetings, phone conferences, etc..

4.4. Persons Allocation

A document called “Persons Allocation” is regularly updated and made available in the Project Quality folder of BSCW (http://bscw.research-infrastructures.eu/bscw/bscw.cgi/69924). This document lists all of the people involved in the BELIEF-II project, their specific roles and contact information.

The “Persons Allocation” is managed by the Coordinator. To inform the Coordinator of a change in your role, responsibilities, contacts or the addition or departure of your team members, send an email to coordinator@beliefproject.org.

5. Document Control

The Project Manager and the Quality Manager are responsible for ensuring that the documents are controlled effectively. This refers to:

- The control of document referencing.
- The control of overall formal deliverable quality.

IMPORTANT NOTICE

All documents must be produced with Microsoft Office tools (Word, Excel and PowerPoint) and must be saved and exchanged in Office 2003 formats for compatibility matters.

All official documents and deliverables must be available also in PDF format.

5.1. Document Types & Templates

Project documents areas follows:

Document type	Responsibility	Periodicity	Template to be used
Deliverable	As in DoW	As in DoW	Deliverable template
Presentation	As applicable	As applicable	Presentation template
Meeting Minutes	PM (or chairing partner)	As applicable	Minutes template
Quarterly Report (QR)	PM, Partner Managers	Every three months	QR template
Periodic Management Report (PMR)	PM, Partner Managers	As in Contract	PMR template
Financial Statements	All partners	As in Contract	As in Contract

Microsoft Word, PowerPoint, etc. templates have been produced for most of BELIEF-II document types. These are available on the BSCW in the “Templates & Material” folder (http://bscw.research-infrastructures.eu/bscw/bscw.cgi/69970). It is mandatory to use these templates for all documents to be submitted to the European Commission.

A limited set of “styles” has been defined in the templates: take care of use them consistently with the template example when writing your documents. All documents will be written in English.

5.2. Document Identification

A unique document identifier to ensure effective version control must reference each document. The document identifier is defined as:

For deliverable documents:

<Project name>-WP<WP number>-<Del. id>-<Del. name>-V<Version.Revision>

Example: BELIEF-II-WP5-D5.2-Project Quality Plan-V1.0

For non-deliverable documents:

<Project name>-WP<WP number>-<Doc. type>-<Doc. number>-V<Version.Revision>

Example: BELIEF-II-WP5-Meeting Minutes-01-V1.0

Where:

- Project name: BELIEF-II
- WP number: As in DoW, in the form “N”
- Deliverable id: As in DoW
- Deliverable name: As in DoW
- Document type: As defined in table above.
- Document number: A progressive number, in the form “NN”
- Version.Revision: a number in the form “N.N”, where Revision should “freeze” the state of a document sent for review to any partner/entity (i.e. no further change is allowed on that revision after the document has been sent).

5.3. Deliverables

5.3.1. “Dates of Delivery” for Deliverables

The template which is currently being used for the submission of deliverables to the EC includes two “dates of delivery” on the document information page: “Contractual Date of Delivery” and “Actual Date of Delivery”. The contractual date of delivery should read the date identified in the Project Plan and be written in the format Month X. The actual date of delivery should be left blank by the authors. The Coordinator will enter the date on which the final draft was submitted via electronic mail to the EC and the two hard copies were posted to the EC (the deliverables will always be sent via electronic mail and posted on the same day). Please see the “Document Information” of this handbook for an example.

5.3.2. Reviewers for Deliverables

“Reviewers” have been selected to examine and evaluate certain deliverables (Note: The reviewers’ list is available on the BSCW as “Deliverables & Reviewers” file in the “Deliverables” folder at http://bscw.research-infrastructures.eu/bscw/bscw.cgi/69974). A reviewer is a partner that does not participate in the deliverable to which he/she is assigned. Therefore, some technical partners review non-technical deliverables. The reviewers’ list will be updated (or confirmed) at least annually. As a general rule, at least one person per partner will review each deliverable.

5.3.3. Review Management Flow

Deliverables are due to the European Commission at the end of “Month X” in the Project Plan. The deliverable review procedure is as follows, where Month X = “Contractual Date of Delivery” and the active participant for each step is in **bold** font:

- In Month X-1, the **author** should send the deliverable’s “Table of Contents” to the assigned reviewer in order to familiarize he/she with the content. At this time, the **author** must establish the deadlines for review with the **reviewer**. By default, the dates named below will apply.
- On the 1st of Month X, the **author** submits the deliverable to the **reviewer** by uploading to BSCW (folder “Deliverables - Under review”) and warns the WP Leaders and the Project Manager via email.
- On the 10th of Month X, the **reviewer** sends comments and remarks back to the author by sending a new “tracked” version of the deliverable and warning the WP Leaders and the Project Manager via email. The reviewed file must be identified adding the reviewer’s organisation short name to the file name.

- The **author,** the **reviewer and the Quality Manager** must work together to make the requested modifications and/or clarifications.
- On the 20th of Month X, the **Quality Manager** submits the final version of the deliverable to the PMB by uploading to BSCW (folder "Deliverables - Under review") and warns the WP Leaders and the PMB via email. The **Quality Manager** must accompany the deliverable submission with an email (the "review report") explicitly stating approval of the deliverable's quality with regard to both the technical aspects and the overall presentation. If the reviewer does not feel to be in a position to make this explicit statement, then he/she must explain the reasons why. In this way, the PMB can make an appropriate decision to validate or reject the deliverable.
- Within the end of Month X, the **Project Manager** will request the PMB to state any objection to submission to the EC. The **Project Manager** will also guarantee reviewing of qualified English mother tongue. The final deliverable submitted to the EC will be uploaded to BSCW (folder "Deliverables - "Submitted to the EC"). Public deliverables will also be uploaded to the DL.

Comments made by the reviewer must be made as specific as possible. Comments which are too general in nature often cannot be answered.

If any difficulties or delays arise in the deliverable review process, the Project Manager should be informed immediately. Solutions will then be achieved on a case-by-case basis.

The role of the reviewer is to monitor the quality of the deliverable to the best of his/her capacity. Some reviewers may not have the necessary competence in a particular area to guarantee that the content is the best that can be produced by the author. Therefore, the review process should lead to an agreement and/or compromise between the reviewer and the author.

Ideally, authors of deliverables will negotiate with their assigned reviewer prior to the due date to develop a timeframe that fits the needs of both parties.

In extreme cases, where the quality of the deliverable does not meet the expectations of the work package leader, reviewer and/or PMB, the authors must contact the PMB with a proposal for improvement. An extension of the delivery time in order to allow for rework may or may not be granted.

Review of on-going deliverables

The review procedure should be adapted for the "ongoing deliverables". For ongoing deliverables, the new sections should be indicated to the reviewer by using the "tracking changes" function provided by MS Word. Additionally, the deliverables should include a textual description in the "Log of Changes" section which highlights the new sections of the deliverable, explicitly stating the evolutions that have been made to the document.

5.4. Quarterly Reporting

The consortium is contractually required to submit Quarterly Reports (QR) to the European Commission once every three months. The QR template can be found on the BSCW (folder "Templates & Materials").

Partners are also required to perform tri-monthly effort reporting. This is assembled by the PM and distributed to the partner managers and work package leaders for review and comparison with the level of activities described in the corresponding QR for the period.

5.4.1. Report Production

The two-step procedure to follow for production of the QR is as follows:

1. **All Partners** must use the QR template. They must complete one QR per partner. Such QR includes all active work packages in which the partner participates. The updated template can be found at: http://bscw.research-infrastructures.eu/bscw/bscw.cgi/69970.
2. **All Partner Managers** must make a consolidated report for their work and return it to the PM by the date established. The **due dates** for the QR are sent by the PM to belief2-partners@metaware.it every three months when the new due date has been established.

Tips for QR production:

- Be concise!
- Objectives should be related to work outlined in the project's DoW, and not just the "task of the day".
- Do not to confuse objectives and means for achieving the objectives.
- Focus on "real" action, whether it is in the form of progress, deviation, correction or achievement.
- The level of granularity for the QR is high. Provide a sufficient amount of detail to clearly describe the work that has been accomplished.
- Partners must declare any delay in task delivery, but a contingency plan must also be presented along with the delay.

5.4.2. Quarterly Report Review

Single QR from partners are submitted to the PM within 20 days after the end of the reporting period. Single QR from partners are integrated and finalised in a consolidated QR by the PM. The PM will then submit the draft report to the QM. The PM and QM will work together until a satisfactory report is achieved.

At this time, the draft report will be made available on the BSCW (folder "Reports & Reviews") and the PMB will be notified by the PM via email that the report is ready for review. The email will also propose times for discussion via teleconference, if necessary. A PMB teleconference will then be held providing the opportunity for discussion of the report's contents as well as requests for changes. The PM will provide a final document based on the outcomes of this discussion, and the final draft will then be submitted to the project officer for review.

The review process must be finalised within 60 days after the end of the reporting period.

5.5. Periodic Management Report

The consortium is contractually required to submit a yearly Periodic Management Report (PMR) to the European Commission. The PMR template can be found on the BSCW (folder "Templates & Materials"). The PMR includes effort reporting and financial details.

5.5.1. Report Production

The PMR is authored by the PM on the basis of the QRs related to the PMR reporting period.

The following administrative and financial details will be reported:

- Justification of major cost items and resources (textual, for each WP).
- Budget and costs (tables with explanations, see template), including:
  - Effort, costs and grants per WP and Task.

    - Costs per Events.
    - Costs per Deliverables.
- Summary of the impact of major deviations.

5.5.2. Management Report Review

Single PMR contributions from partners are submitted to the PM within 20 days after the end of the reporting period. The PMR is finalised by the PM. The PM will then submit the draft report to the QM. The PM and QM will work together until a satisfactory report is achieved.

At this time, the draft report will be made available on the BSCW (folder “Reports & Reviews”) and the PMB will be notified by the PM via email that the report is ready for review. The email will also propose times for discussion via teleconference. A PMB teleconference will then be held providing the opportunity for discussion of the report’s contents as well as requests for changes. The PM will provide a final document based on the outcomes of this discussion, and the final draft will then be submitted to the project officer for review.

The whole review process must be finalised within 60 days after the end of the reporting period.

6. Conflict Resolution

Effective conflict resolution requires an understanding of the individual and collective management roles; BELIEF-II's Project Management Structure is visually represented below:

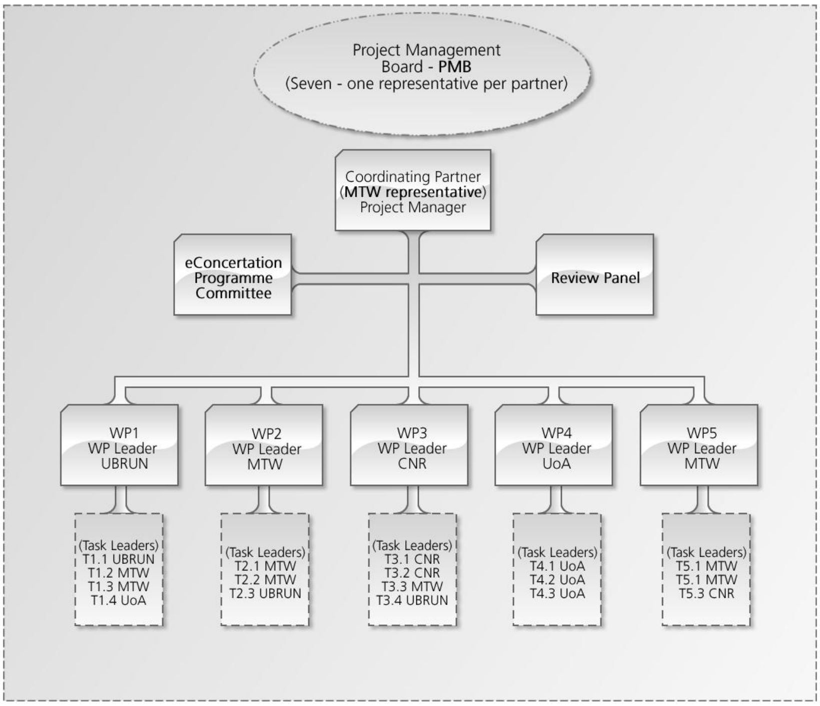

Figure 1 - Project Management Structure

When a conflict arises between partners, the following escalation process should be followed:

1. Send an email explaining the situation to the relevant work package leader with the conflicting party in copy.
   <u>Action and outcome:</u>
   + WP leader successfully resolves conflict,
   - if no resolution achieved, go to step 2.
2. WP leader sends and email to the PM explaining the situation and the efforts already made toward conflict resolution, with both of the conflicting parties in copy.
   <u>Action and outcome:</u>
   + PM successfully resolves conflict through additional knowledge of the project, or via a teleconference discussion with the conflicting parties,
   - if no resolution achieved, go to step 3.
3. PM raises the issue with the PMB via a teleconference, communicating the situation to the PMB with an email summarising: the conflict, actions already taken, and an action plan proposed by the PM.
   <u>Action and outcome:</u>
   + PMB proposes a resolution for the conflicting parties who accept their proposal,
   - PMB votes on a resolution which must be accepted by the conflicting parties.

If this should not be sufficient, the partners should refer to the Consortium Agreement.

7. Dissemination Policies

The following paragraphs introduce various guidelines for proper dissemination of information related to the BELIEF-II project. The application of dissemination policies is subject to a per-case evaluation of their applicability.

7.1. Approval Procedure

In the following text there will be continuous reference to "approval". The procedure of obtaining approval in BELIEF-II is simple and efficient. It is a two-step action:

- Announce intention
- Obtain approval

The approval requesting party should announce its intention for a specific action to the BELIEF-II project's instruments, so that the most relevant parties are informed. This should be done at least 2 weeks prior to the requested action to be taken. In extreme cases that this cannot be achieved, the notification must be made as soon as possible.

Relevant parties may be boards, partners, persons or entire work packages.

The project's related mailing lists must be utilized for the announcement, with copies being sent to the involved WP list(s) and to the T3.4 - "BELIEF-II dissemination" Leader or the PMB in extreme cases. Unless an objection is raised, approval is obtained implicitly, i.e., by not getting any sort of objection within a reasonably requested time.

T3.4 is the group to propose a first level solution to any unresolved issue. However, in case a dead-end is reached, higher level management will be notified for action.

From this point on, approval refers to the above-mentioned procedure.

7.2. General Guidelines

In addition to approval, the following is a generic set of guidelines for BELIEF-II events and material:

- Intentions to perform any primary dissemination activity are generally required to pass the approval stage, using the referenced tools (global mailing lists, WP lists, etc.).
- Partners should not initiate BELIEF-II dissemination activities without prior communication an agreement on the dissemination strategy with the Dissemination Task Leader.
- PM and PMB are to decide on conflicts.
- All publicly held activities should present their material in electronic form to the rest of the consortium.
- All dissemination material should identify ways of acknowledging BELIEF-II, e.g.,
    - indicate that it is a true result of BELIEF-II work and have a robust basis,
    - indicate that it contains results related to BELIEF-II theme/work.
- A specific event/action should be proposed to T3.4 for validation, if it is a project-wide dissemination activity.
- Strictly local events and actions might not conform to all rules presented; however a notice should always be made to the project instruments.

7.3. Participation in Events

Gathering information

Once a BELIEF-II partner receives information on an upcoming conference, workshop, etc., the informed person:

- Sends an email to belief2-partner@metaware.it informing the consortium of the up-coming event.
- Enters the event, location and any other useful information on the BELIEF-II Event Calendar.

When a BELIEF-II partner receives an invitation to present an aspect of BELIEF-II at an event, or to represent the project on behalf of the consortium, the informed person (in addition to the above):

- Sends an email to the PMB representatives of the partners (belief2-partner@metaware.it).
- The PMB discuss and agree on the most appropriate person to present at the event.

In exceptional cases (such as the EGEE Conferences, etc.), the PMB decides on the group of individuals that should attend in function of the benefit that can be acquired.

In all of the above cases, T3.4 participants are informed so that the appropriate dissemination material can be prepared and ready for the event.

Attending the event

When presentations are made externally, the presentation should be sent to the PMB for comments and approval prior to the event. Ensuring that the PMB receives a copy of all presentations made also allows the T3.4 participants to create a repository, which can facilitate the production of presentations for “first-time” presenters.

After the event

When a BELIEF-II member participates in a conference, workshop, etc., that is not directly related to the project, the person is invited to attach a brief memo of the event to the entry posted on the Event Calendar. In this way, people can easily reference the event, the date and read a summary of the event, knowing the person to contact for more information.

For the most relevant events (EGEE or OGF Conferences, etc.), the attending individuals are requested to produce as a group a summary document of knowledge and outcomes obtained. This summary should be distributed to the consortium along with any other important documents distributed at the event.

7.4. Presentations

Giving BELIEF-II-related presentations at various events is a task that could be carried out by any BELIEF-II partner, for their own reasons of exploitation and publicity. Thus, making presentations is not an obligation or privilege of T3.4 core participants.

Some minor restrictions:

- Concerning the presenter, if more than one partner has access to the event, then a common decision should be made. Generally, the person most concerned with the event or targeted audience should be selected, however exceptions might occur.
  Example of high relevance is a local partner at local presentations, etc..

- Presentations should always use the supplied template of BELIEF-II unless otherwise dictated by the specific event.
- Presentation material should always make clear reference to the BELIEF-II project.
- Presentations should conform to the EU rules for publications.
- Existing presentations can (and should) be reused, after publicly notifying their creators and obtaining approval for any modifications. However, it is an ethical policy that some reference to the creator should be made.
- When a partner publicly presents another's work (i.e., work not produced or owned or assisted), he/she should always obtain approval by the interested parties.
- No presentation should publish classified material of the project without explicit permission from the PM.
- General description of the presentation's content should be made available prior to presentation for comments.
- Presentations should be made internally available to BELIEF-II partners and, if approved by interested parties, made publicly available through project's collaboration tools.
- Presentations should explicitly respect the Consortium Agreement.

The above-mentioned policy could drastically change to face needs that might rise in the future.

7.5. Publications

The policy for publications is similar to that of presentations and many of the abovementioned rules are also applicable.

Publications can be categorised as "PR" (Public Relations) and "S" (Scientific). The first category usually refers to documents that abstractly cover topics addressed by the project, while the second category refers to the widely known scientific world publications.

Generally projects do not pose restrictions on publications, because of the well known applied ethical rules that apply (regarding references, authors, unpublished work, owned work, proofs, etc.). All of these rules will be safeguarded within BELIEF-II, plus a number of rules that are internal to BELIEF-II, such as:

- Publications must be announced to the consortium, under a simple multi-step procedure coping with limitations posed by IPRs and ethics:
    - An optional request is submitted to other interested parties for collaboration.
    - A simple notification is posted to the consortium right after the submission of the first draft to the event / medium.
    - An optional abstract is submitted to other interested consortium members.
    - An "executive summary" version of the document is presented to the consortium for approval, 2 weeks prior to the final submission.
    - In case no external limitation applies to the publication, the full text of the published document is made available to the entire consortium right after the final submission.
- All partners that are being involved in the actual work that a publication is based on should be consulted prior to its announcement.
    - Special care should be taken when publishing cross-cutting work.
    - Copyright issues will be faced upon partners' objection.
- In addition to the above, as a general guideline, the rest of the partners that are involved in the work being presented should internally approve the published material.
- Publications should conform to the EU rules for publications.

- All publications should refer to BELIEF-II project as their primary supporting action.
- Partners should limit publications on work which is their main objective within BELIEF-II, unless otherwise approved by the project members.
- Publications should explicitly respect the Consortium Agreement.

8. Other Procedures

8.1. eConcertation

The procedure for the planning, organisation, delivery and follow-up of the eConcertation events is fully described in Section B1.3-WP1-T1.1/2/3 of the DoW.

8.2. e-Infrastructures News Magazine

The procedure for the production of the e-Infrastructures News Magazine is fully described in Section B1.3-WP2-T2.2 of the DoW.

8.3. Symposia

The procedure for the planning, organization, delivery and reporting of the Symposia is fully described in Section B1.3-WP4-T4.1/2/3 of the DoW.

9. Performance Indicators

The BELIEF-II consortium has developed a number of “performance indicators” that are applied to internal evaluation of the project as a whole.

The project’s performance indicators can be found in “Appendix A – Performance Indicators”.

10. Periodic Reporting

The reporting period for the BELIEF-II project runs from April-June. Several reports are due to the European Commission at the end of each reporting period. The reports for which partners must contribute include:

- Periodic Quarterly Report-QR (overview of the progress).
- Periodic Management Report-PMR (financial data). Includes a justification of resources deployed and a Form C for each contractor, along with audit certificates if required.
- All deliverables.

MTW has produced an indispensable set of guidelines to assist partners with the periodic reports. These can be found in the report templates on the BSCW (folder “Templates and Material”) at: http://bscw.research-infrastructures.eu/bscw/bscw.cgi/69970.

Partners are highly recommended to read this document carefully prior to the preparation of the annual cost and effort reports.

NOTE: The delivery date of all periodic reporting is the time of arrival of the paper version of the complete set of reports, unless specific instructions are made to submit them via electronic mail. All reports (including Form C) and deliverables must be submitted both on paper (one copy, two copies for deliverables) and electronically (exception for audit certificates, only a paper copy is requested).

11. Quality Plan Review

The quality plan applied in BELIEF-II is to be reviewed at least yearly within the PMB taking into account:

- Results from project reviews.
- Results from **internal audits** (if any, see below).
- Project Deliverables.
- Related corrective and preventive actions.
- Project staff adequacy for the tasks undertaken.
- Level of resource usage per category and adequacy of spent resources for the particular task.

The above will be examined in the PMB meetings, and the following will be recorded in the minutes:

- Satisfaction with the audits, corrective actions and results of complaints.
- Dissatisfaction and requirements for further auditing or more corrective actions.

Internal audits may be carried out in special cases, when a problem of paramount importance arises. This will be performed by the followings:

- Project Manager
- Quality Manager
- WP Leader(s) that are most relevant to the problem under inspection.

All the findings of the internal audit will be documented by the QM who will then issue corrective actions and arrange for follow-up actions. The results f the internal quality audits will be distributed to all partners.

12. References

[BSCW] Be Smart – Cooperate Worldwide
http://public.bscw.de/

[CA] Project BELIEF-II Consortium Agreement
BSCW http: BELIEF-II Consortium Agreement_Final.pdf

[Doodle] Events scheduling and polls support
http://www.doodle.ch/main.html

[DoW] Project BELIEF-II Annex I – “Description of Work”
BSCW http: BELIEF-II DoW 21012008 Final

[MoU] Project BELIEF-II MoU and DL Technical Annex Template
BSCW http: BELIEF-II - PROJECTX MoU & DL Technical Annex V1.0 Draft.doc

13. Appendix A – Performance Indicators

Different classes of indicators

Four different classes of indicators will be used to monitor the project:

Typology	Description
Coordination and Integration	Evaluating project's effectiveness as an event catalyst.
User Community	Building and sustaining a "productive" User Community around project's themes.
Valorisation	Making the most of the project's outcomes outside the Consortium
Technical	Evaluating the technical relevance of the project's communication platform (Portal and D)L.

Table 1 - Classes of indicators

Different measurement methodologies

Five different ways of measuring performance will be used to monitor the project:

Typology	Description	Example
Qualitative	This means the "level of compliance" of a subject with respect to clear qualitative indicators.	Quality of metadata with respect to a "metadata quality profile"
Quantitative	This means very clear quantitative indicators with a numerical target.	Number of access
Report	This typology of measurement indicates that the success indicators are for one part quantitative, but also qualitative, to have a better evaluation, a more detail analysis is needed.	Estimation of investment
Interviews and user interaction analysis	For all indicators including the user interaction and satisfaction it is impossible to evaluate the success status without an analysis of real user behaviour in managing the system. For this reason this class of indicators will be used where the users interaction is needed.	User interface satisfaction
Documentation	In this case the achievement of the indicator must be evaluated according to the documentation produced for the Project. ***Please Note*** *- The difference between Documentation and Report is that in the first case the analysis will be based on documents produced for the project, instead Report means a document produced "ad hoc" for the indicator measurement.*	User Manual and SW Documentation

Table 2 - Ways of measure

Performance Indicators

	Indicators	Way of measure
CI	**Coordination and Integration**	
CI1	Achievements of user requirements (comparing with the DoW, user feedbacks, etc.)	Interviews, Report
CI2	Numbers of users comments and observation integrated into the project's platform	Quantitative, Report
CI3	Integration between BELIEF-II and other European initiatives (projects, workgroups, etc.)	Report
CI4	Number of jointly organised events	Quantitative
CI5	Number of attendees to project-sponsored events	Quantitative
CI6	Number of extra-European joint collaborations	Quantitative
CI7	Number of organisations (i.e., industry, users) involved in project-activities	Quantitative
CI8	New initiatives launched	Report
CI9	Participation in the exchange and discussion	Quantitative, Qualitative
CI10	Establishment of contacts among the participants after the events and frequency of contacts	Quantitative
CI11	Number of cooperative activities and initiatives that will emerge	Quantitative
CI12	Spill-over effect of the events, in terms of publications produced, international reputation of the project, etc.	Quantitative, Qualitative
U	**User Community**	
U1	Analysis of value created for the users	Qualitative
U2	Numbers of content/information sources integrated into the community platform	Quantitative, Report
U3	Number of new community members (individuals and organisations)	Quantitative, Report
U4	Number of documents accessible via DL	Quantitative
U5	Quality of documents and metadata accessible via DL	Qualitative ([1])
U6	Percentage of users involvement into the requirements specification and feedback	Quantitative, Report
U7	Publications in user specific context (guidelines, best practice, papers, etc)	Quantitative

[1] The documents and metadata quality is evaluated with respect to [MoU].

	Indicators	Way of measure
U8	Number of contacts made by interested parties	Quantitative
V	**Valorisation**	
V1	Numbers of researchers involved outside the Consortium	Quantitative
V2	Integration between BELIEF-II and research activities (thesis, collaborations, etc.)	Qualitative
V3	Dissemination documentation produced	Documentation
V4	Successful participation and attendees satisfaction	Interviews, User Analysis
V5	Number of platform demonstrations	Quantitative
V6	Press echoes (articles, references, etc)	Quantitative
V7	Estimation of investment and resources attracted to enlarge the community and the results	Quantitative, Report
V8	Portal impact (Numbers of access, feedbacks, downloads, etc.)	Quantitative, Report
V9	DL impact (idem)	Quantitative, Report
V10	Impact on international cooperation (joint events with global grid communities)	Qualitative
T	**Technical**	
T1	Number of interaction meetings with the e-Infrastructures and the DL (specifically) communities	Quantitative
T2	Amount of feedback given to the e-Infrastructures and the DL communities	Quantitative
T3	Re-usability of the developed functionality	Qualitative
T4	Usefulness of the hand-out documentation produced for other communities	Qualitative
T5	Demonstrations designed and produced	Report
T6	Quality of the system documentation	Qualitative
T7	New experimented technologies	Quantitative
T8	Quality of the implemented functionality	Qualitative
T9	Portal & DL usability (easy of use, number of visits and returns after first visit, etc.)	Qualitative, Quantitative

Table 3 - Classification of indicators

14. Appendix B – Project Bodies and Roles

Project Manager

- Stephen Benians – MTW

Deputy Project Manager

- Giovanna Calabrò – MTW

Project Management Board

- Project Manager
- Donatella Castelli – CNR-ISTI
- Yannis Ioannidis – NKUA
- Edison Spina – FUSP
- B.B. Tiwari – ERNET
- Simon J. Taylor – UBRUN
- Johan Eksteen – Meraka Institute

WP Leaders

- WP1 - eConcertation exchange – Stephen Benians, MTW
- WP2 – Promoting integrated e-Infrastructures – Tiziana Lombardo, MTW
- WP3 - Knowledge exchange tools and activities – Franco Zoppi, CNR-ISTI
- WP4 – Symposia: disseminating global relevance of e-Infrastructures – Eleni Toli, NKUA
- WP5 – Project Management – Stephen Benians, MTW

Quality Manager

- Franco Zoppi – CNR-ISTI

Project Quality Board

- Quality Manager
- WP Leaders

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