

DCitizens Fostering Digital Civics Research and Innovation in Lisbon

DELIVERABLE 7.1: Project Handbook

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D7.1: Project Handbook

Project Information

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Contributors	-
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Executive Summary

The Project Handbook offers guidelines for the members of the DCitizens project. It covers the most important aspect of the project, including general project information, responsibilities, working and communication practices, information about deliverables and milestones, project reporting and infrastructure for file storage, and management of the intellectual property. The Handbook is released as the first deliverable of DCitizens for reference and will be revised as procedures change during the project.

The general principles for the project execution are defined in the Grant Agreement (GA), the Description of the Action (DoA), and the Consortium Agreement (CA). The Project Handbook does not replace any of these established agreements, nor does it replace any of the EU guidelines for project implementation and documentation.

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1. General Project Information

Digital Civics is a cross-disciplinary research area that posits the use of technology in the provision of relational models of public services. It aims to empower citizens and non-state actors to co-create, take an active role in shaping agendas, make decisions about service provision, and make such provisions sustainable and resilient. In particular, how digital technologies can scaffold a move from transactional to relational service models and the potential of such models to reconfigure power relations between citizens, communities, and institutions.

DCitizens aims to achieve five main objectives: O1) Enhance IST research profile and innovation competence in Digital Civics; O2) Provide training to Staff and Early Stage Researchers to build critical mass at the interface of research, local government, and the private/third sectors; O3) Establish a leading pole of excellence in Digital Civics; O4) Strengthen and expand the collaborative network between the Twinning partners; and O5) Establish a Digital Civics Research and Innovation Agenda in line with the Smart Specialization Strategy for Lisbon.

The project's work plan includes a staff-exchange programme, organisation of joint scientific/training events, activities to enhance the profile of young researchers, training of research management staff, and a small citizen-led research project.

1.1. Participant Organisations

Participant Name	Short Name	Country
Instituto Superior Técnico (Coordinator)	IST	Portugal
Istituto Italiano di Tecnologia	IIT	Italy
Universitaet Siegen	USI	Germany
University of Northumbria at Newcastle	UNN	United Kingdom

1.2. Useful Contacts

Role	Contacts
Project Coordinator (IST)	Hugo Nicolau Email: hugo.nicolau@tecnico.ulisboa.pt Mobile: +351 96 85 10 432
Project Manager (IST)	Dina Dionisio Email: dina.dionisio@tecnico.ulisboa.pt
Dissemination and Communication Manager (IST)	Daniel Ribeiro Email: daniel.costa.ribeiro@tecnico.ulisboa.pt

Project Officer (EC)	Paula Valente Correia Email: paula.valente-correia@ec.europa.eu
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1.3. Project Members

Org.	Name	Email	Role
IST	Hugo Nicolau	hugo.nicolau@tecnico.ulisboa.pt	Project Coordinator
	Dina Dionisio	dina.dionisio@tecnico.ulisboa.pt	Project Manager
	Daniel Ribeiro	daniel.costa.ribeiro@tecnico.ulisboa.pt	Communication Manager
	Nuno Nunes	nunojnunes@tecnico.ulisboa.pt	Professor
	Valentina Nisi	valentina.nisi@tecnico.ulisboa.pt	Professor
	Augusto Esteves	augusto.esteves@tecnico.ulisboa.pt	Professor
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	Mariana Pestana	marianapestana@tecnico.ulisboa.pt	Professor
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	Ana Pires	ana.pires@iti.larsys.pt	Researcher
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	Inês Silva	inesfilipacoelhosantos@tecnico.ulisboa.pt	PhD Student
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João Nogueira	jrnogueira@edu.ulisboa.pt	Research Engineer	
Patricia Piedade	patricia.piedade@tecnico.ulisboa.pt	MSc Student	
IIT	Alessio Del Bue	alessio.delbue@iit.it	Researcher (contact person)
	Stuart James	stuart.james@iit.it	Researcher

	Matteo Taiana	matteo.taiana@iit.it	Researcher
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	Isabel Santori	isabel.santori@iit.it	Project Manager
USI	Volker Wulf	volker.wulf@uni-siegen.de	Researcher
	Markus Rohde	markus.rohde@uni-siegen.de	Researcher (contact person)
	Sarah Rüller	sarah.rueller@uni-siegen.de	Researcher
	Konstantin Aal	konstantin.aal@uni-siegen.de	Researcher
UNN	Kyle Montague	kyle.montague@northumbria.ac.uk	Researcher (contact person)
	Shaun Lawson	shaun.lawson@northumbria.a.uk	Researcher
	Pamela Briggs	p.briggs@northumbria.a.uk	Researcher
	Reem Talhouk	reem.talhouk@northumbria.ac.uk	Researcher

2. Legal Aspects

This section describes the documents that form the legal basis for the implementation of DCitizens.

2.1. Grant Agreement

The Grant Agreement consists of the following:

- Terms and conditions (this is the core contract)
- Annexe 1: Description of the action
- Annexe 2: Estimated budget for the action
- Annexe 2a: Additional information on unit costs and contributions
- Annexe 3: Accession forms
- Annexe 4: Model for the financial statements
- Annexe 5: Specific rules

Although the core contract is signed between the EC and the Coordinator of the project, all partners (from EU state members) have become individual contract partners with the Commission by signing the Accession Forms.

The Grant Agreement must be kept by all partners and should be provided to the auditor in case of an audit. It is downloadable in the participant portal and management platform of the DCitizens project.

2.2. Consortium Agreement

Whereas the Grant Agreement is signed between the EU and the partners (from EU state members), the Consortium Agreement is signed between all partners themselves. It arranges in more detail the provisions of the Grant Agreement, such as but not limited to financial issues, payments, management, decision making, conflict resolution, intellectual property rights and liability.

The Consortium Agreement must also be kept by the partners and must be shown in case of audits.

2.3. Amendments

During the project, circumstances may arise to call for a request to the EU for an amendment of the Grant Agreement. Reasons may vary, but could be:

- Change of partner(s).
- Change of legal entity.
- Changes in the Description of the Action (Grant Agreement: Annex 1).
- Changes in the Budget (Grant Agreement: Annex 2).

In case an amendment is needed, the Coordinator shall submit such a request after an autonomous decision by all partners in the General Assembly (see Section 3). After approval, the Coordinator shall distribute the revised Grant Agreement to the partners, replacing former versions.

Budget changes that do not affect the content of the description of action can be taken care of by the consortium itself, i.e., through the General Assembly and inform the Project Officer. Amendments may be requested by any of the project partners.

3. Management Bodies, Structure, and Procedures

3.1. Principles

The management structures of DCitizens are designed to effectively coordinate the organisation of the project on three levels: 1) the interaction between the EC and the project; 2) the collaboration between the project partners; and 3) the coordination and monitoring of the daily work by means of mechanisms for financial, quality, risk, communication, and progress management.

The project management structures are formalised in the Consortium Agreement. The description below summarises some of the main features. Procedures for meetings, agendas and voting are described in detail in the Consortium Agreement and are not reproduced in this handbook.

3.2. Management Structure

The governance of DCitizens consists of two bodies, which are assisted by a scientific advisory board. The latter body is not a management body of DCitizens but provides

input on the research strategy and overall progress and impact of the project. The three bodies are (**Error! Reference source not found.**):

- Coordinator: an intermediary between partners and the EC.
- General Assembly: highest decision-making body in the consortium.
- Scientific Advisory Board: advisory body on research tasks.

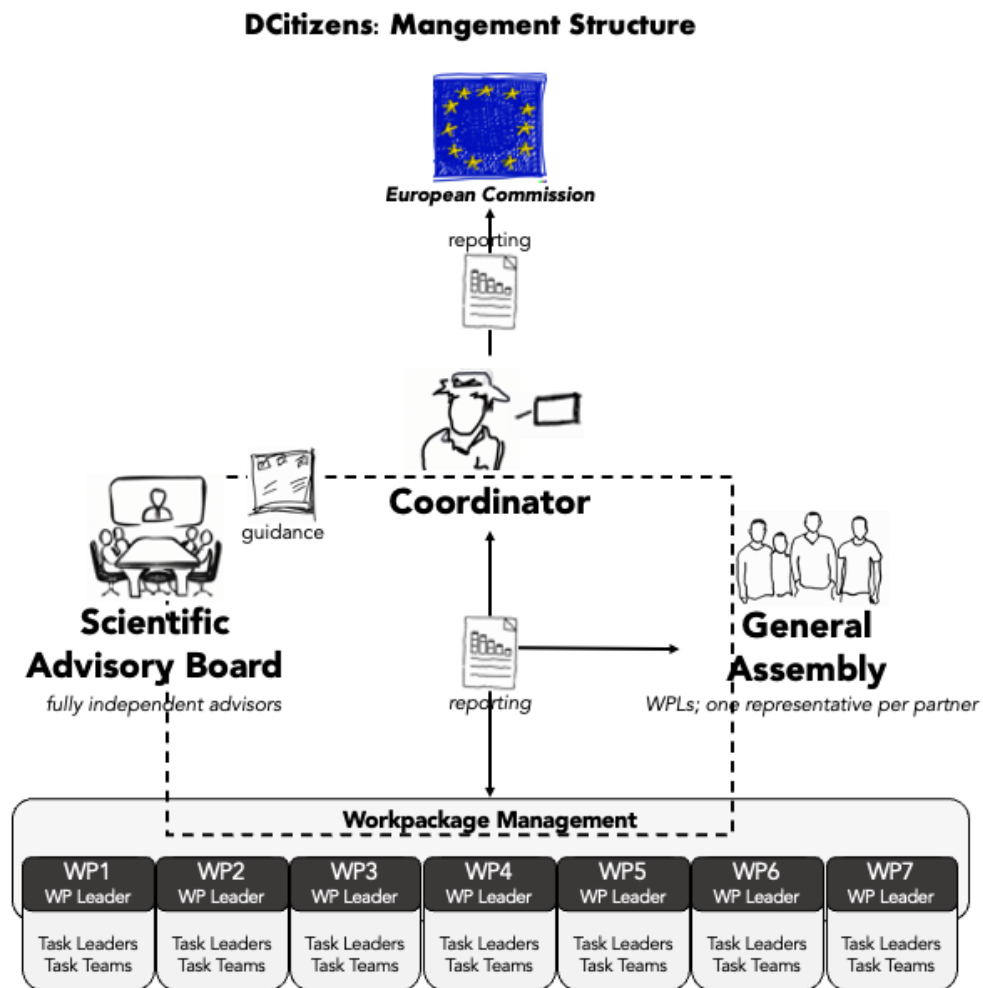


Figure 1. DCitizens management structure.

3.2.1. Coordinator

Members:

- Hugo Nicolau (Scientific Coordinator)
- Dina Dionisio (Project Manager)

Responsibilities:

- Interface and alignment with the EC.
- Liaising between partners.

- Monitor the compliance by beneficiaries with their obligations under Grant Agreement.
- Monitor the use of resources regarding their allocation between beneficiaries and activities.
- Handling legal and ethical documentation.
- Organise periodic project meetings, prepare meetings' agenda, keep and collate the minutes of all discussions and undertake specific actions from each meeting.
- Financial accounting and auditing (as and when required).
- Monitor the status of activities in terms of milestones and deliverables.

3.2.2. General Assembly (GA)

All partners have one seat in the GA, which will meet every six months to fine tune the progress in the work packages and tasks and to agree on strategic actions needed to reach milestones and deliverables. The Coordinator will prepare the meetings of the GA.

Members:

- Hugo Nicolau (IST)
- Alessio Del Bue (IIT)
- Markus Rohde (USI)
- Kyle Montague (UNN)

Responsibilities:

- Strategic decisions
- Activities programming
- Budget and financial (re)allocations.
- Decisions upon substantial changes or amendments of the terms of the Consortium Agreement.
- Decisions upon requests to the EC
- Review and/or amend provision(s) of the Grant Agreement.
- Access of new partners/third parties as well as measures towards defaulting partners up to exclusion.
- Problem solving procedures and decisions for corrective actions.
- Arbitration of all decisions and disputes settling.

3.2.3. Scientific Advisory Board (SAB)

Members:

- Lizzie Coles-Kemp (University of London) - lizzie.coles-kemp@rhul.ac.uk
- Paulo Ferrão (University of Lisbon) - ferrao@tecnico.ulisboa.pt
- John Richards (IBM) - ajtr@us.ibm.com

- Ann Light (University of Sussex and Malmo University) - ann.light@gmail.com
- John Zimmerman (Carnegie Mellon University) - johnz@cs.cmu.edu
- John Vines (University of Edinburgh) - john.vines@ed.ac.uk

Responsibilities:

- Provide guidance on research tasks of DCitizens while securing relevance for the impact of the project in Lisbon.
- Review the progress of all research activities annually, ensuring that the project is building capacity on Digital Civics Research and Innovation in Lisbon.

4. Work Package and Document Management

This section describes the work package management structure, deliverables, milestones, and indicators the project expects to achieve. It also describes day-to-day tools and procedures, such as the management and document sharing platform.

4.1. Work Package Leaders and Task Leaders

The Work Package Leaders (WPLs) and the Task Leaders (TLs) will be responsible for the detailed implementation of the WP and tasks as well as the preparation of the corresponding deliverables and milestones. The WPLs perform operative management at the level of their WP and are responsible for the following activities:

- Coordinating and supervising the activities of the TLs.
- Monitor the progress of the WP set against the planned deliverables and milestones.
- Reporting progress to the Coordinator, at project meetings, and in management reports.
- Assess risks and propose contingency plans to the Coordinator and the GA.
- Immediately reporting major decisions related to any deviation from the work plan.
- Highlighting any partners whose contributions are of insufficient or of unacceptable quality.

The TLs assist the WPLs in planning, managing, and performing their respective tasks in the WP context.

ID	WP/Task Name	Lead Org.	Lead
WP1	Short-term staff exchanges	ITI	Hugo Nicolau
T1.1	Staff exchanges with IIT	IIT	Alessio Del Bue
T1.2	Staff exchanges with USI	USI	Markus Rohde
T1.3	Staff exchanges with UNN	UNN	Kyle Montague
WP2	Organisation of joint events	UNN	Kyle Montague
T2.1	Summer schools	UNN	Kyle Montague

T2.2	Invited lecture series	UNN	Kyle Montague
T2.3	Scientific workshops	ITI	Hugo Nicolau
WP3	Enhancing the scientific profile of ESR	USI	Markus Rohde
T3.1	Internships and exchanges	USI	Markus Rohde
T3.2	Participation in conferences and events	ITI	Hugo Nicolau
T3.3	Training courses for ESR	USI	Markus Rohde
WP4	Joint research: Commissioning Digital Civics research in Lisbon	ITI	Hugo Nicolau
T4.1	Ethics framework	ITI	Hugo Nicolau
T4.2	Case study commissioning	ITI	Hugo Nicolau
T4.3	Civic events	ITI	Hugo Nicolau
T4.4	Reporting and showcasing events	ITI	Hugo Nicolau
WP5	Strengthening the research management capacity	IIT	Alessio Del Bue
T5.1	Strategy of the Research Management Unit	ITI	Hugo Nicolau
T5.2	Implementation of the unit	ITI	Hugo Nicolau
T5.3	Management training for ITI team	IIT	Alessio Del Bue
WP6	Dissemination, communication, and outreach	ITI	Hugo Nicolau
T6.1	Website	ITI	Hugo Nicolau
T6.2	Promotional materials	ITI	Hugo Nicolau
T6.3	Social media	ITI	Hugo Nicolau
T6.4	Round-table discussions	ITI	Hugo Nicolau
T6.5	Open days	ITI	Hugo Nicolau
WP7	Project Management	ITI	Hugo Nicolau
T7.1	Administration and coordination	ITI	Hugo Nicolau
T7.2	Meeting organisation	ITI	Hugo Nicolau
T7.3	Data management plan	ITI	Hugo Nicolau
T7.4	Dissemination and exploitation plan	ITI	Hugo Nicolau

4.2. Deliverables

Project deliverables serve as the outcome of WP progress. WPLs are responsible for the preparation and release of the deliverables. To produce the deliverables, they will gather contributions from TLs.

The deliverables will be presented to the Coordinator, who is then responsible for reviewing them and submitting them to the EC within the contractual deadline. Reviews shall be made using track changes, and sent back to WPLs for validation.

Deliverables and milestones shall be completed on time. If deliverables or milestones are late, WPLs **MUST** provide an explanation, contingency plan, and the anticipated completion date.

Templates for the deliverable reports are available in Annexe A and in the document sharing platform.

The process of generation of the written deliverables is described below.

Status	Responsibility	Description
Draft	WPL	The WPL starts preparing the report and gathers information from TLs. Afterwards, uploads the draft to the shared document platform and informs partners of its availability for review.
Review	Coordinator	The Coordinator and other partners give comments and reviews within 5 calendar days.
Final version	WPL	The WPL uploads the final version and informs the coordinator that it is ready for approval.
Approved	Coordinator	The Coordinator verifies the deliverable. If necessary, the Coordinator can ask the WPL for adjustments. Once this process is finished, the Coordinator marks the deliverable as approved.
Submitted	Coordinator	The Coordinator submits the deliverable to the EC through the Participant Portal by the due date, alert the PO and WPL by email, and mark the deliverable as submitted in the management platform.

Please note that for each step of deliverable generation and review – especially in case of Reports – a note shall be added in the Document Log, after the cover page.

Below is the list of deliverables in chronological order.

ID	Name	WPL	Due Date
D1.1	Exchange plan	Hugo Nicolau	Jan/23
D6.1	Website and promotional materials	Hugo Nicolau	Jan/23
D7.1	Handbook	Hugo Nicolau	Jan/23
D2.1	Invited lectures programme	Kyle Montague	Feb/23
D3.1	ESR training programme	Markus Rohde	May/23
D5.1	Research management unit action plan	Alessio Del Bue	May/23
D5.2	Management training plan	Alessio Del Bue	May/23
D7.2	Data management plan	Hugo Nicolau	May/23
D7.3	Dissemination and exploitation plan	Hugo Nicolau	May/23
D4.1	Ethics framework	Hugo Nicolau	Nov/23
D1.2	Midterm report on staff exchanges	Hugo Nicolau	Apr/24
D2.4	Midterm report on joint events	Kyle Montague	Apr/24

D3.2	Midterm report on ESR activities	Markus Rohde	Apr/24
D4.2	Case study portfolio	Hugo Nicolau	Apr/24
D5.3	Midterm report on management training	Alessio Del Bue	Apr/24
D6.2	Midterm report on dissemination	Hugo Nicolau	Apr/24
D7.4	Midterm progress report	Hugo Nicolau	Apr/24
D2.2	Submission of 1 st workshop proposal	Hugo Nicolau	Aug/24
D2.3	Submission of 2 nd workshop proposal	Hugo Nicolau	Aug/25
D7.5	Impact assessment and forecast	Hugo Nicolau	Sep/25
D4.3	R&I Agenda	Hugo Nicolau	Nov/25
DX.X	Final progress report	Hugo Nicolau	Nov/25

4.3. Gantt Chart and Milestones

As a general rule, the same purpose, responsibilities and procedures of the milestones are similar to the deliverables (see the previous section). Below is the list of milestones as well as a representation of WP, milestones, and deliverables (Figure 2).

ID	Name	WPLs	Lead	Due Date
M1	Kick-off meeting	Hugo Nicolau	Hugo Nicolau	Dec/22
M2	Launch of website and promotion materials	Hugo Nicolau	Hugo Nicolau	Jan/23
M3	Strategy and action plan of Research Management Unit	Alessio Del Bue	Hugo Nicolau	May/23
M4	Activities for ESR, joint events, and staff exchanges – midterm	Hugo Nicolau Kyle Montague Markus Rohde	Hugo Nicolau	Apr/24
M5	Activities for ESR, joint events, and staff exchanges – final	Hugo Nicolau Kyle Montague Markus Rohde	Hugo Nicolau	Nov/25

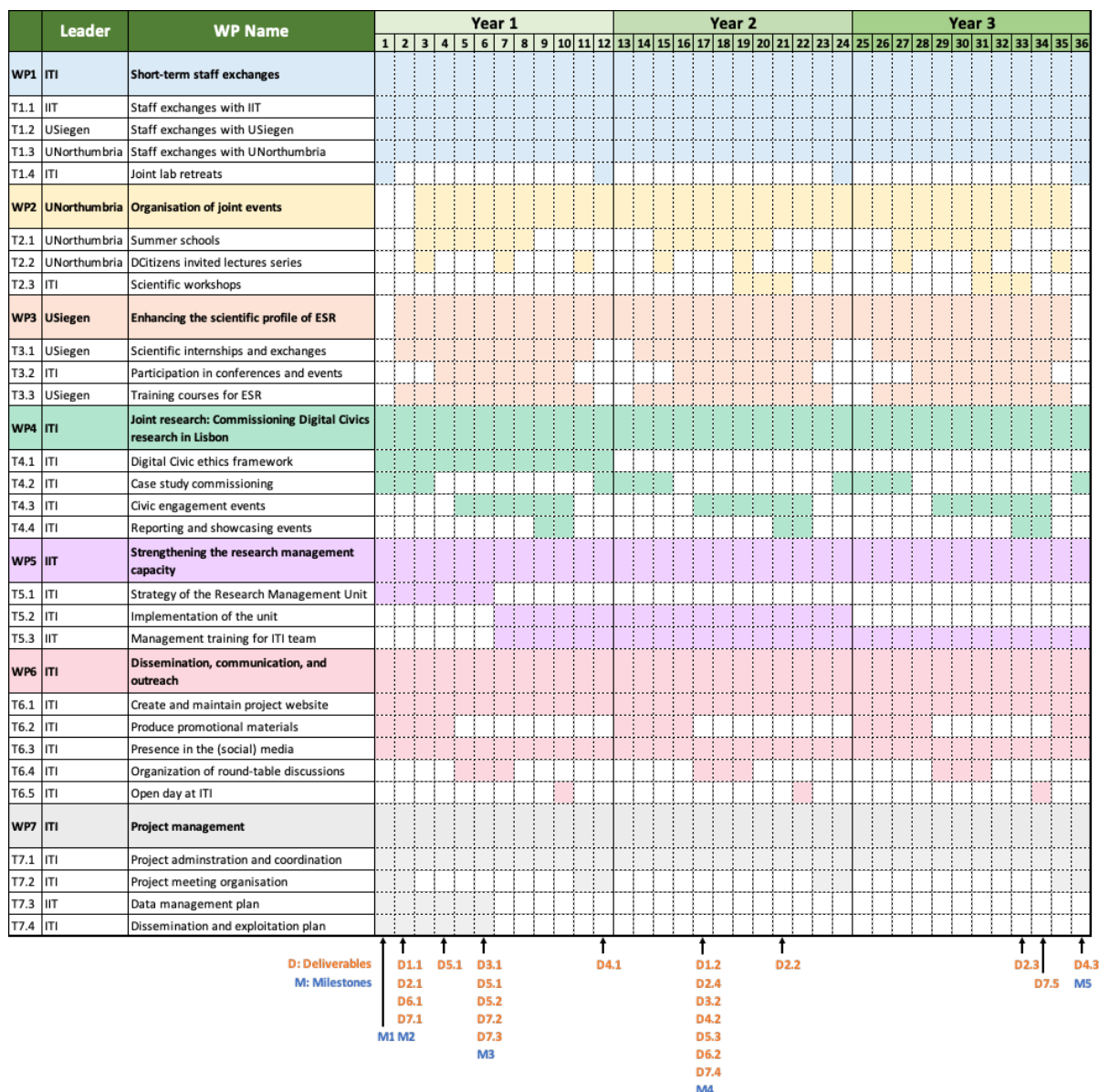


Figure 2. DCitizens Gantt chart: WP, tasks, deliverables, and milestones.

4.4. Key Performance Indicators (KPIs)

KPIs should guide the strategic and operational work of WPLs and TLs. Both WPLs and TLs should monitor and strive to achieve the proposed KPI targets from Year 1 (Y1) to Year 3 (Y3). There is a spreadsheet in the document sharing platform intended to facilitate monitoring the KPIs.

WPL	KPI	Base	Y1	Y2	Y3	>Y3
Hugo Nicolau	Exchanges with IIT (weeks)	-	15	13	13	-
	Exc. w/ USI	-	13	15	13	-
	Exc. w/ UNN	-	13	13	15	-
	Joint lab retreats	-	2	1	1	-
	Joint journal papers	0	0	1	2	>5
	Joint conference papers	1	1	2	3	>10

	Co-supervision of PhD students	0	1	1	2	>5
WP2 Kyle Montague	Summer schools	-	1	1	2	-
	Expected number of attendees per event	-	>25	>25	>25	-
	International scientific workshop	-	0	1	1	-
	Invited lecture series	-	3	3	3	-
WP3 Markus Rohde	Internships and exchanges	-	2	2	2	-
	Conference participation	-	10	10	10	-
	Short courses (number/participants)	-	1/10	1/10	1/10	-
	New MSc students from IST working on Digital Civics	-	2	4	6	>10
	New PhD students from IST working on Digital Civics	-	0	1	2	>5
WP4 Hugo Nicolau	Ethics framework	-	1	-	-	-
	Digital Civics case study in Lisbon	-	1	1	1	>3
	Research & Innovation agenda	-	-	-	1	-
WP5 Alessio Del Bue	Research management unit	-	0	1	0	-
	Courses on management (number/participants)	-	1/4	2/8	1/4	-
	EU project proposals	1	1	2	2	-
	Bilateral projects	0	1	1	1	-
	Funded projects	2	2	3	4	>4
WP6 Hugo Nicolau	Website	-	1	0	0	-
	Updates on the website and social media	-	10	10	10	-
	Promotional materials	-	4	1	1	-
	Round-table discussions	-	1	1	1	-
	Press releases	-	1	1	1	-
	TV and/or radio interviews	-	1	1	1	-
	Open days	-	1	1	1	-
WP7 Hugo Nicolau	Handbook	-	1	-	-	-
	Meetings	-	2	1	1	-
	Data management plan	-	1	1	1	-
	Dissemination and exploitation plan	-	1	1	1	-
	Annual project report	-	1	1	1	-
	Peer reviews by the SAB	-	1	1	1	-

4.5. Management Platform

A collaborative space for the DCitizens Project has been set up on the ©EMDESK platform. This platform was specifically built to facilitate the management and coordination of EU projects. The platform is accessible from the following link: <https://app.emdesk.com/#!/login>

Access to the collaborative platform is controlled via a username and password. These are chosen by the invited users separately and are not included here to maintain privacy.

The ©EMDESK platform supports the following activities:

- Project progresses controlling
- Resources and Costs monitoring and reporting
- Report management and preparation
- Deliverable monitoring and management
- Document management
- Project Calendar management
- Contacts management and messaging.

Detailed info about how to use the platform can be found online at <https://help.emdesk.com/>. A complete video walkthrough of the platform is also available at <https://www.youtube.com/watch?v=QN6mVzxJa1U>.

Partners will be supported by the Coordinator to develop the necessary knowledge and skills to use the tool at best, allowing a smooth management of administrative and technical reporting tasks.

4.6. Document Sharing and Storage

Documents can be stored and exchanged on the management platform using the “Documents” menu.

4.6.1. Document Repository and Properties

Important and institutional project files are stored and maintained on the platform by the Coordinator (e.g., Grant Agreement, Consortium Agreement).

The management platform includes a folder structure organised in main categories. Partners shall not delete any existing folders or files but should add further sub-folders when relevant or needed.

Folders may also be created for storing temporary files where, for example, these are too large to circulate by email.

WPLs should use the “Properties > Tags” and “Properties > Linked items” features when uploading documents to allow automatic indexing of the project documentation (i.e., a deliverable draft should be linked to the corresponding deliverable). All partners should always tag and link uploaded documents or files with

reference to a specific WP, task, deliverable, milestone or report. This practice will facilitate search and retrieval of information.

4.6.2. Version Control and File Naming

Partners should use the versioning feature of EMDesk (“upload new version”) to avoid working with obsolete versions of documents.

Nevertheless, it is essential that every document circulated in the consortium includes a version number and date. The guidelines below should be followed as much as possible:

1. Include the WP number
2. Be descriptive of the contents of the document/file
3. Indicate the date (dd_mm_year) of creation
4. Include the short name of the partner that has created/last modified the document/file
5. Include, at the end, the version number – version numbers should start at 1.0 and be incremented just by the author of the document by 0.1 for minor revisions, and by 1.0 for major revisions/new releases, e.g., “WP7_D7.1-handbook_30_12_2022_IST_v1.docx”,

When suggesting changes to a document, contributors should use the track changes feature to assist the document author/owner.

5. Project Meetings and Communication

5.1. Project Meetings

The procedures described in this section apply to all DCitizens meetings. Important aspects of the GA meetings are described in greater detail in the Consortium Agreement.

Below are the project meetings described in the Description of Actions and Consortium Agreement.

Meeting	Date	Location
Kick-off meeting (1 st lab retreat)	January 2023	Lisbon, Portugal
General Assembly	May 2023	Videoconference
2 nd lab retreat	November 2023	Genova, Italy
General Assembly	May 2024	Videoconference
3 rd lab retreat	November 2024	Siegen, Germany
General Assembly	May 2025	Videoconference

Wrap-up meeting (4 th lab retreat)	November 2025	Newcastle, United Kingdom
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Apart from these meetings, WPLs and TLs should organise additional meetings as deemed appropriate, either in-person or online.

5.1.1. Organisation of Meetings

Generally, meetings are organised by a representative from the hosting organization.

Videoconferences are organised by the Coordinator or WPLs/TLs for General Assemblies or WP meetings, respectively.

The meeting appointments shall be sent by the meeting organiser via email, both for in-person meetings and videoconferences.

Hereafter follows a recap of the different procedures per type of meeting.

Meeting	Frequency	Notice	Agenda	Add item
Lab retreat	At least once a year	45 cal. days	14 cal. days	7 cal. days
GA	Every 6 months	14 cal. days	14 cal. days	7 cal. days
WP/Task	Whenever necessary	ASAP	ASAP	ASAP

The agenda shall be sent previously to the meeting with the necessary notice time. If any change arises in the agenda previously shared, the participants of the meeting shall be promptly notified and the new version shall be shared.

5.1.2. Meeting Minutes

Keeping minutes for all project meetings is extremely important as they are a record of the decisions taken and the actions required by the partners in the project.

It is the responsibility of the meeting organisers to take the minutes and upload them to the management platform (in the respective WP folder) by 15 calendar days after the meeting. Attendants should comment and approve the minutes. The minutes are automatically approved if no comments are received within 20 calendar days. If the minutes need to be updated, the updated file will be again uploaded by the author to the management platform, and a notification shall be sent to the participants of the meeting.

5.2. Internal Communication

Communication within the project will happen through different channels. Whilst face-to-face meetings will be held regularly; there are several virtual communication

channels through which project members, including advisory bodies and WP teams can communicate daily.

5.2.1. Communication Platform and Contacts

Contact details for all partners can be found in the dedicated area of the management platform from the “Collaboration” (Collaboration > Contacts).

5.2.2. Emails and Mailing Lists

Emails can be sent by private email provider to the addresses listed in “Contacts”. Email etiquette - as identified below - always applies. To facilitate the management of emails related to the project, they should always include in the subject title:

1. The name of the project (DCitizens)
2. The WP to which the communication is related (i.e. WP2) or an indication of the overall matter
3. A brief description of the content. E.g., [DCitizens – WP7] Project handbook

Mailing lists can be created with the contacts in the platform, in the dedicated area from the “Collaboration” (Collaboration > Groups). The created mailing list addresses can then be used by each partner with their own email provider. Each partner has the responsibility to periodically update the mailing lists they created.

5.2.3. Video Conferences

The platform also supports videoconference through the “Meetings” menu (Collaboration > Meetings). Partners can use such functionality or other videoconference platforms (e.g., Zoom). Either way, organisers should send the link to the meeting event.

5.3. External Communication

Dissemination activities in DCitizens are deeply intertwined with the joint research project in WP4. Particularly, the project will organise a series of in-person civic events to engage local communities, public sector, and industry in a research commissioning process in Lisbon. Moreover, we will leverage science communication events and IST open day to disseminate project activities.

The remaining of this section focus on online dissemination tools.

5.3.1. Project identity and promotional materials

A common graphic identity has been defined to allow for improved visibility and recognition as well as branding of the DCitizens project.

Therefore, all dissemination tools and activities must refer to or include:

- The name of the project
- The project’s website URL
- DCitizens project logo

- Acknowledgements to EC public funds, displaying the EU emblem and including the following text: *"This project has received funding from the European Union's Horizon Europe Framework Programme under Grant Agreement No 101079116."*
- An indication that it reflects only the author's view and that the Commission is not responsible for any use that may be made of the information it contains: *"The content of this document does not represent the opinion of the European Commission, and the European Commission is not responsible for any use that might be made of such content."*

All branding materials related to the graphic identity of DCitizens are available in the management platform.

We plan to produce posters, banners, and flyers for the project.

5.3.2. Project website

Websites are one of the main communication tools of projects funded under Horizon Europe Programme. To ensure maximum visibility to the DCitizens objectives and results, we will set up a project website registered in the ".eu" domain and with an easy-to-remember URL to increase hit rates: <https://dcitizens.eu/>. The website will include a counter of visitors and other statistical tools that will be used to measure how the website is used. The website will also link to other civic platforms developed during the project.

5.3.3. Newsletter and social media

The branding of DCitizens includes social media templates to be used in popular social media platforms such as Twitter and Instagram. It is the responsibility of the Communication Manager to post monthly in these platforms to raise the profile of DCitizens.

We will also create an annual newsletter with major news and project progress.

5.3.4. Project presentations

All presentations prepared for and given at internal meetings, such as lab retreats and side meetings at conferences, will be stored in the management platform. A template for project presentations will be covered in D7.3 – Dissemination and exploitation plan.

6. Innovation Management and Intellectual Property

Issues around innovation management and intellectual property (IP) are regulated in three sections of the Consortium Agreement: Results, Access rights, and Non-disclosure of confidential information.

Although all the outputs from the project will be open unless specified otherwise, where exploitable IP is developed, IP management will follow the Consortium

Agreement. The General Assembly will monitor the IPR of the project, taking responsibility for setting the appropriate parameters for the use of IPR.

Some of the key points from the Consortium Agreement can be summarised in a simplified form as follows:

- There is a commitment to open dissemination of results.
- Parties that contributed to results shall be joint owners of the results.
- Access rights to results and background IP needed for the performance of the work of a party shall be granted on a royalty-free basis unless otherwise agreed in the attachment.
- Results and background must be used only for the purpose for which access rights have been granted.
- Information specifically marked as confidential must not be disclosed or used other than for the purpose for which it was disclosed.

7. Open Access and Data Protection

Briefly summarised, the project's outputs are, by default, openly accessible and reusable. Therefore, project results will be shared and placed under appropriate licenses that allow re-use with attribution. All other information, i.e., minutes, drafts, emails, etc., are treated as confidential according to article 36 of the Grant Agreement.

The handling of sensitive data will be addressed in D7.2 - Data Management Plan. The collection of personal data and its storage in accordance with the GDPR is also addressed in the Data Management Plan (D7.2).

8. Reporting

Throughout the lifetime of the project there are three types of reporting: periodic reporting to the EC, continuous reporting to the EC, and internal progress reporting.

8.1. Periodic reporting to the EC

Formal reporting to the EC is due after 18 months (April 2024) from the project starting date and again at the end of the project (November 2025). Reporting is carried out using the EC's online platform, which specifies the required contents: a periodic technical report and a periodic financial report. These reports are required within 60 days of the end of the period.

All deliverables are aligned with the periodic report due date. WPLs are expected to contribute to the technical report, with input from all partners as needed. All funded partners must provide an individual financial statement detailing their eligible costs for the period.

In summary, the technical part must be prepared using the [template available in the Portal Periodic Reporting tool](#) and include the following:

- An explanation of the work carried out by the partners (i.e., action implementation).
- An overview of the progress towards the objectives of the action, including milestones and deliverables. This report must include explanations justifying the differences between the work expected to be carried out and that carried out. The report must also detail the exploitation and dissemination of the results and an updated 'plan for the exploitation and dissemination of the results.
- A summary for publication by the Commission.
- The answers to the 'questionnaire', covering issues related to the action implementation and the economic and societal impact.

The periodic financial report contains the following:

- The financial statements (individual and consolidated; for all beneficiaries and affiliated entities) – for further details on cost eligibility, see Grant Agreement.
- The explanation on the use of resources (or detailed cost reporting table, if required).
- The certificates on the financial statements (CFS) (if required; see Article 24.2 and Data Sheet, Point 4.3 of the Grant Agreement).

The financial statements must detail the eligible costs and contributions for each budget category and, for the final payment, the revenues for the action (see Articles 6 and 22 of the Grant Agreement).

All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget. Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority.

Beneficiaries will also have to submit the financial statements of their affiliated entities (i.e., UNN). In case of recoveries, beneficiaries will be held responsible also for the financial statements of their affiliated entities.

8.2. Continuous reporting to the EC

The Coordinator must continuously report on the progress of the action (e.g., deliverables, milestones) using the Continuous Reporting tool in the EC Portal and in accordance with the timings in the Grant Agreement. Thus, it is of utmost importance that WPLs produce all outputs in a timely manner.

8.3. Internal Reporting

In addition to the reporting to the EC, lightweight reports for internal use will be required by the Coordinator from all WPL every six months, including:

- Short written reports of the activities and progress per work package.

- Updates on deliverables, risks, problems, and planned activities.
- The staff effort (person-months) expended in the preceding six months.
- A summary of all personal costs
- A summary of non-staff costs such as travel, workshop costs, etc.

Internal reporting will enable the Coordinator to track effort and spending against plan and to detect any deviations early. The Coordinator will produce templates for internal reporting (Annexe B). These will be discussed in the GA meetings that also take place every six months. The Coordinator will work with the GA to ensure the reporting of milestones and deliverables.

DCitizens Fostering Digital Civics Research and Innovation in Lisbon

DELIVERABLE X.X:

<Title>

DCitizens has received funding from the European Union's Horizon Europe Framework Programme, project call HORIZON-WIDERA-2021-ACCESS-03, grant agreement 101079116



DX.X: Title

Project Information

Grant Agreement	101079116
Title	Fostering Digital Civics Research and Innovation in Lisbon
Acronym	DCitizens
Funding Scheme	Twinning
Start date	01/12/2022
Duration	36 months
Call	HORIZON-WIDERA-2021-ACCESS-03
Website	https://dcitizens.eu/

Deliverable Information

ID	DX.X
Title	
WP	
WP Leader	
Contributing Partners	
Nature	
Authors	
Contributors	
Reviewers	
Deadline	

Dissemination Level

PU	Public	<input checked="" type="checkbox"/>
PP	Restricted to other programme participants	<input type="checkbox"/>
RE	Restricted to a group specified by the consortium	<input type="checkbox"/>
CO	Confidential, only for members of the consortium	<input type="checkbox"/>

Document Log

Version	Date	Author	Description of Change
1			

Disclaimer

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Executive Summary



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1. Section

Body text

1.1. Subsection

Body text

1.1.1. Subsubsection

Body text

Example				



European Commission

Figure 3. Caption example

Annexe B: Internal Reporting Template

Instructions on how to fill out the report

For all partners:

Fill out each **Task (section 2)** where you are involved:

- Any **Achievements** (submitted deliverable, finished app/service, conducted a user study, finished planning a civic event, submitted paper, etc.)
- Achieved **Milestones** (with reference to the "Description of Action")
- **Work items in progress** you are involved with
- Always include a reference to a document (e.g., minutes, deliverable, internal report, submitted paper)
- Highlight important outputs, especially in the WP summary (e.g., publications, events, reports)
- List the individual persons who were involved in the task

List the number of person*months that you are claiming (section 5.1).

Regarding travel reporting (section 5.4), only travels that are charged to the project must be included.

For Task Leaders:

- **Trigger input** from all partners that are involved in your task
- Fill in the **table in the "Summary"** section of the WP, which gives a short impression of whether you are on track or whether there are deviations. Note: deviations are fine as long as we keep track of them and adjust the project plan accordingly. The more details you provide us with your report, the better we can adapt the project plan, report to the EC, and get feedback from the PO with respect to proposed deviations
- Harmonise the input from your partners based on the discussions that you had during the reporting period.

For Work Package Leaders:

- Trigger input from all tasks and monitor the progress
- Review deviations and find solutions for the next steps (together with the TLs)
- Provide one paragraph with a summary of the reporting period
- Harmonise the input from all tasks
- Fill in the deliverables status in Section 3.1

Table of Content



1. Executive Summary

<responsible: Coordinator>

.....

2. Technical Progress

2.1. WP1: Short-term Staff Exchanges

Summary

<responsible: Hugo Nicolau>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T1.1	Not started yet			
T1.2	Ok			
T1.3	Delayed			
T1.4	Completed			

T1.1: Staff Exchanges with IIT

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T1.2: Staff Exchanges with USI

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T1.3: Staff Exchanges with UNN

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T1.4: Joint Lab Retreats

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.2. WP2: Organisation of Joint Events

Summary

<responsible: Kyle Montague>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T2.1	Not started yet			
T2.2	Ok			
T2.3	Delayed			

T2.1: Summer Schools

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T2.2.: Invited Lecture Series

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T2.3: Scientific Workshops

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.3. WP3: Enhancing the Scientific Profile of ESR

Summary

<responsible: Markus Rohde>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T3.1	Not started yet			
T3.2	Ok			
T3.3	Delayed			

T3.1: Scientific Internships and Exchanges

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T3.2: Participation in Conferences and Workshops

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T3.3: Training Courses for ESR

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.4. WP4: Joint Research: Commissioning Digital Civics Research in Lisbon

Summary

<responsible: Hugo Nicolau>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T4.1	Not started yet			
T4.2	Ok			
T4.3	Delayed			
T4.4	Completed			

T4.1: Digital Civics Ethics Framework

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T4.2: Case Study Commissioning

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T4.3: Civic Engagement Events

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T4.4: Reporting and Showcasing

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.5. WP5: Strengthening the Research Management Capacity

Summary

<responsible: Alessio Del Bue>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T5.1	Not started yet			
T5.2	Ok			
T5.3	Delayed			

T5.1: Strategy of the Research Management Unit

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T5.2: Implementation of the Unit

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T5.3: Management Training for the ITI Team

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.6. WP6: Dissemination, Communication, and Outreach

Summary

<responsible: Hugo Nicolau>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T6.1	Not started yet			
T6.2	Ok			
T6.3	Delayed			
T6.4	Completed			
T6.5	Completed			

T6.1: Create and Maintain Project Website

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T6.2: Produce Promotional Materials

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T6.3: Presence in the (Social) Media

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T6.4: Organisation of Round-Table Discussions

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

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T6.5: Open Day at ITI

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

2.7. WP7: Project Management

Summary

<responsible: Hugo Nicolau>

.....

Task	Status	Variance	Cause/Wayforward	Affected partners
T7.1	Not started yet			
T7.2	Ok			
T7.3	Delayed			
T7.4	Completed			

T7.1: Project Administration and Coordination

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T7.2: Project Meeting Organisation

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T7.3: Data Management Plan



<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

T7.4: Dissemination and Exploitation Plan

<responsible: each partner fills in its information in a row>

Partner	Achievements, Milestones, Work items in progress	Involved people

3. Status of Deliverables and Milestones

3.1. Deliverables

<responsible: WPLs>

NS (Not Started), D (Delayed), OK (On Schedule), C (Completed)

ID	Name	WPL	Status	Due Date
D1.1	Exchange plan	Hugo Nicolau		Jan/23
D6.1	Website and promotional materials	Hugo Nicolau		Jan/23
D7.1	Handbook	Hugo Nicolau		Jan/23
D2.1	Invited lectures programme	Kyle Montague		Feb/23
D3.1	ESR training programme	Markus Rohde		May/23
D5.1	Research management unit action plan	Hugo Nicolau		May/23
D5.2	Management and training plan	Alessio Del Bue		May/23
D7.2	Data management plan	Hugo Nicolau		May/23
D7.3	Dissemination and exploitation plan	Hugo Nicolau		May/23
D4.1	Ethics framework	Hugo Nicolau		Nov/23
D1.2	Midterm report on staff exchanges	Hugo Nicolau		Apr/24
D2.4	Midterm report on joint events	Kyle Montague		Apr/24
D3.2	Midterm report on ESR activities	Markus Rohde		Apr/24
D4.2	Case study portfolio	Hugo Nicolau		Apr/24
D5.3	Midterm report on management training	Alessio Del Bue		Apr/24
D6.2	Midterm report on dissemination	Hugo Nicolau		Apr/24
D7.4	Midterm progress report	Hugo Nicolau		Apr/24
D2.2	Submission of 1 st workshop proposal	Hugo Nicolau		Aug/24
D2.3	Submission of 2 nd workshop proposal	Hugo Nicolau		Aug/25

D7.5	Impact assessment and forecast	Hugo Nicolau		Sep/25
D4.3	R&I Agenda	Hugo Nicolau		Nov/25
DX.X	Final progress report	Hugo Nicolau		Nov/25

3.1.1. Corrective Actions in Case of Delays

<responsible: WPLs>

.....

3.2. Milestones

<responsible: Coordinator>

NS (Not Started), D (Delayed), OK (On Schedule), C (Completed)

ID	Name	WPLs	Status	Due Date
M1	Kick-off meeting	Hugo Nicolau		Dec/22
M2	Launch of website and promotion materials	Hugo Nicolau		Jan/23
M3	Strategy and action plan of Research Management Unit	Alessio Del Bue		May/23
M4	Activities for ESR, joint events, and staff exchanges – midterm	Hugo Nicolau Kyle Montague Markus Rohde		Apr/24
M5	Activities for ESR, joint events, and staff exchanges – final	Hugo Nicolau Kyle Montague Markus Rohde		Nov/25

3.2.1. Corrective Actions in Case of Delays

<responsible: Coordinator>

.....

4. Dissemination and Exploitation

<responsible: Coordinator>

.....

5. Resources and Expenses

5.1. Figures for the latest semester (MM/YYYY – MM/YYYY): Personnel in PMs

<responsible: each partner fills in its information in a row>

(A)ctual; (P)lanned;

Partner	WP1		WP2		WP3		WP4		WP5		WP6		WP7		TOTAL
	A	P	A	P	A	P	A	P	A	P	A	P	A	P	
IST															
IIT															
USI															
UNN															
TOTAL															

5.2. Accumulated (MM/YYYY – MM/YYYY): Personnel in PMs

<calculated automatically>

Partner	WP1		WP2		WP3		WP4		WP5		WP6		WP7		TOTAL
	A	P	A	P	A	P	A	P	A	P	A	P	A	P	
IST															
IIT															
USI															
UNN															
TOTAL															

5.3. Summary of PMs

<calculated automatically>

WP	Semester		Accumulated	
	Actual	Planned	Actual	Planned
WP1				
WP2				
WP3				

WP4				
WP5				
WP6				
WP7				
TOTAL				

Partner	Accumulated		Total Project
	Actual	Planned	
IST			
IIT			
USI			
UNN			
TOTAL			

5.4. Travel and Other Expenses

<responsible: each partner fills in its information>

Table 1. Travel expenses.

Partner	Meeting / Conference	Title	Attendee(s)	Date and Place	Cost (€)
TOTAL					€

Table 2. Other costs.

Partner	Description of cost	Cost (€)

TOTAL		€

6. Further description of any Problem, Delay or Deviation from the Planned Work Schedule, and the Corrective Actions Taken

<responsible: Coordinator>