

**COVER PAGE**

<b>Project acronym:</b>	<b>DESIRE</b>
<b>Project full title:</b>	Designing the Irresistible Circular Society
<b>Call identifier:</b>	HORIZON-MISS-2021-NEB-01
<b>Type of action:</b>	CSA
<b>Start date:</b>	01.10.2022
<b>End date:</b>	30.09.2024
<b>Grant Agreement no:</b>	101079912

**PROJECT MANAGEMENT PLAN - REVISION #1  
- DELIVERABLE 1.3**

<b>WP 1 - Task 1.1</b>	Project Management
<b>Due date:</b>	30.09.2023 (M12)
<b>Submission date:</b>	30.09.2023
<b>Dissemination level</b>	PU
<b>Deliverable Type</b>	Report
<b>Authors:</b>	Aase Højlund Nielsen (BXH)
<b>Reviewers:</b>	All WP leaders - Henriette Thuen (WP6 leader) has commented
<b>Version:</b>	1.2
<b>Status:</b>	Final

**DISCLAIMER**

Funded by the European Union. Views and opinions expressed in this Deliverable are however those of the author(s) only and do not necessarily reflect those of the European Union or CINEA. Neither the European Union nor the granting authority can be held responsible for them.



**VERSION HISTORY**

No.	Date	Description	Author
1.1	20.09.2023	Final draft	Aase Højlund Nielsen, BXH
1.2	29.09.2023	Feedback and minor changes	Reviewers + PM

**TABLE OF CHANGES**

Chapter/section	Description of and reason(s) for change
1. Introduction	Update of introduction chapter based on the first 12 months of project management
3.2 Governance structure	Replacement of fig. 3.1 with an updated version. Edition in text and in Table 3.1. Adjustment to align the governance structure with the CA and the paxis conducted during the first 12 months. DMB changed to Executive Body (EB) with three members, based on decision at GA in Nov/Dec 2022. Consequential corrections throughout the document.
5.1 Cost management	Sections about assessment of staff efforts and forecasting for the remaining projec period (M13-M24) added, based on decisions at the GA in May 2023 and EB meeting in July 2023.
6.1 Risk management strategy	Removal of coordination partners as a specific group to be involved. The role of coordination partners has not been executed specifically - coordination partners are involved in different activities according to their role as facilitating partners or organisations involved directly in sites activities.  Risk analysis changed from being a fixed item at meetings involving all WP leaders to be a fixed item at EB meetings.  Responsibility shifted from ICH group to EB. WP leaders mentioned in stead of ICH group.  Adjustments are made to better reflect practice.
7.1 Quality Management Plan	Table 7.1: The IHC group replaced by the EB according to changes in the governance structure.
8.1 Communication channels	Slack added as internal communication channel
8.1.3 Conference calls	Adjustments in types of meetings, purpose, involvement and responsibility for organising the meeting, due to changed practices.



8.2 Document repository	Reference to the Data Management Plan (D1.2) is added.
-------------------------	--

**ABBREVIATIONS**

CA	Consortium Agreement
CO	Coordinator
DoA	Description of Action
EB	Executive Body
GA	General Assembly
IHC	Internally horizontal coordination
NEB	New European Bauhaus
PMs	Person months
WP	Work package
ERG	External Relations group



**Table of contents**

<b>1. INTRODUCTION</b>	<b>6</b>
<b>2. OVERVIEW OF DESIRE</b>	<b>6</b>
2.1 Project objectives	7
2.2 Project milestones	7
2.3 Project deliverables	8
<b>3. ORGANISATION</b>	<b>9</b>
3.1 Roles and responsibilities	10
3.2 Governance structure	12
<b>4. PROJECT TIMELINE</b>	<b>16</b>
4.1 Responsibility assignment	17
4.2 Schedule management	18
4.3 Adjustment of work plan	19
<b>5. PROJECT RESOURCES</b>	<b>19</b>
5.1 Budget/cost management	20
<b>6. RISK MANAGEMENT</b>	<b>21</b>
6.1 Risk management strategy	21
<b>7. QUALITY MANAGEMENT</b>	<b>23</b>
7.1 Quality Management Plan	24
<b>8. PROJECT COORDINATION RELATED COMMUNICATION</b>	<b>27</b>
8.1 Communication channels	27
8.1.1 Contact list	27
8.1.2 Mailing and mailing lists	27
8.1.3 Conference calls	27
8.1.4 Face-to-face meeting	28
8.1.5 Digital Learning Hub (D5.2 – the DESIRE website)	28
8.2 Document repository	28
8.2.1 Project templates	28
8.3 Shared DESIRE calendar and virtual boards for co-creation activities	29
<b>9. PROJECT REPORTING</b>	<b>29</b>
9.1 Internal reporting	29
9.2 The reporting to the EU	29
<b>10. CHANGE MANAGEMENT</b>	<b>30</b>
10.1 Document change process	31



<b>ANNEXES</b>	<b>32</b>
<i>ANNEX 1 - DESIRE Project Handbook</i>	32
<i>ANNEX 2 - DESIRE Work Plan (GANTT chart)</i>	53

## LIST OF TABLES

<a href="#">Table 2.1</a>	List of milestones, ordered chronologically
<a href="#">Table 2.2</a>	List of deliverables, ordered according to ID.
<a href="#">Table 3.1</a>	Overview of partners
<a href="#">Table 3.2</a>	Grouping of partner roles and responsibilities
<a href="#">Table 3.3</a>	DESIRE governance entities, roles, responsibilities and involvement
<a href="#">Table 4.1</a>	Overview of WPs and tasks + responsible partners
<a href="#">Table 4.2</a>	Action framework for schedule management
<a href="#">Table 5.1</a>	Procedures for cost management
<a href="#">Table 6.1</a>	Action framework for risk management
<a href="#">Table 7.1</a>	Deliverable process
<a href="#">Table 10.1</a>	Approach to approve requests for changes

## LIST OF FIGURES

<a href="#">Fig. 3.1</a>	Governance structure with key entities and roles.
<a href="#">Fig. 4.1</a>	GANTT-overview of the DESIRE project.
<a href="#">Fig. 7.1</a>	The Deliverable process



# 1. INTRODUCTION

This document is Deliverable 1.3 - Project Management Plan (PMP) revision #1. It follows up on Deliverable 1.1 - Project Management Plan which has been applied during the first 12 months of the project Desire - Designing the Irresistible Circular Society, GA no 101079912, one of six New European Bauhaus (NEB) Lighthouse Demonstrator projects, funded within the Horizon Europe programme.

The purpose of the revision of the PMP is to provide an updated plan for the management and control of the organizational, developmental and supporting processes necessary to the successful implementation of the DESIRE project.

It follows the structure of D1.1 PMP: outlines the goals and objectives and organizational structure; defines the responsibilities and roles of project participants; identifies the interactions among project partners; and specifies the general procedures and management tools that are implemented to ensure effective project management and successful project completion. Along with D1.1 PMP, the revision is based on the terms and conditions established in the Grant Agreement no. 101079912 and its Annexes, as well as in the Consortium Agreement and the DESIRE Project Handbook.

The DESIRE project is employing a standard project management approach based on documented timelines, regular communications, active follow up, and quality control and risk mitigation processes. To support its project management approach, the DESIRE project uses a cloud shared, revision history enabled and synced folder solution (provided by Google Drive services), the Microsoft Teams collaborative online platform for conference calls, and virtual boards ( MIRO) for co-creation activities. The combination of these solutions provides the team with facilities for sharing and managing documents, managing work package tasks, tracking progress against task deliverables, scheduling meetings and discussions, and generally ensuring that the distributed project team can pro-actively collaborate to meet project requirements.

To ensure that regular progress reports are produced on time by deliverable leaders, BLOXHUB as Coordinator has created procedures and templates. These procedures have been described in the DESIRE Project Handbook (Annex 1) which functions as a go-to-manual for all beneficiaries, supporting them in a smooth operation and management of tasks and activities across the consortium and the WPs, as well as providing transparency and insight into the management principles of DESIRE. The DESIRE Project Handbook is a living document which is updated and revised continuously according to needs and requirements experienced by the partners. As such, it reflects the project spirit of learning-by-doing and learning-by-interaction. While the Project Management Plan unfolds the overall structures, procedures and principles for project management, the DESIRE Project Handbook summarizes the day-to-day project management as it evolves. Therefore, respecting the experimenting nature of DESIRE, the Project Management Plan is intentionally kept at an overall level, more creating a framework than a list of detailed rules for project management.

## 2. OVERVIEW OF DESIRE

The overall aim of DESIRE is to create an alternative way forward for the built environment supporting the EU mission of ‘100 climate-neutral and smart cities’ and ‘Caring for Soil is Caring for Life’, designing for climate resilience and reconciling cities with nature. The DESIRE project is created with a clear reference to the New European Bauhaus values of sustainability, inclusion and aesthetics.



## 2.1 Project objectives

The project operates with three main objectives:

- 1) To **create an open learning environment** with identifiable values, principles and approaches and realize it in the spirit of the original Bauhaus school, to enable an emerging learning community for aesthetic, inclusive and sustainable urban transformation;
- 2) **Deliver a Lighthouse Demonstrator** for local impact to manifest the NEB values through learnings from eight different territorial transformation sites; and
- 3) **Build a scaling framework** for new EU-wide value through a co-created platform and digital infrastructures for long-term triple bottom line shared value creation, stakeholder involvement, and empowerment.

The objectives will be achieved through principles based on co-creation, engagement and multi-disciplinarity, deploying core concepts of being mission-oriented, providing transparency, adhering to continuous learning and building regenerative capacities.

Detailed descriptions of all work packages, deliverables and milestones are included in the DESIRE Work Plan.

## 2.2 Project milestones

The work plan of DESIRE includes 15 Milestones, each defined and scheduled to ensure tracking of the progress.

No.	Name	WP related	Due date	Means of verification
1	Governance structure established (MS1)	WP1	M2	Validation at kick-off meeting
2	Website functioning (MS2)	WP5	M2	Website accessible and open for all
3	Accommodated understanding of DESIRE principles and how to transform (MS3)	WP2	M4	D2.1 and D2.2
4	Monitoring and evaluation tools released (MS5)	WP4	M6	Appendix of D4.1 (Learning and evaluation framework)
5	Structures for the Digital Learning Hub settled (MS14)	WP5	M6	The existing and functioning website has been made open for interaction
6	Principles customized to the different sites (MS6)	WP3	M8	D3.1
7	Peer-to-peer learning plan released	WP4	M9	Presentation of the plan at a periodic meeting of WPs 3 and 4
8	First tool-kit prototype released (MS8)	WP2	M12	Validation at partner meeting M13



9	Demonstration plans released (MS10)	WP3	M13	Initial report/portfolio documenting the first experiences using the design principles
10	Policy stakeholder initiative with 24 of the 100CNC2030 cities established (MS13)	WP6	M17	Memorandum of Understanding concluded with representatives of the involved cities
11	Digital Learning Hub fully functioning (MS4)	WP5	M18	Website screen shots
12	On-site demonstrations completed (MS7)	WP3	M18	D3.2, D3.3
13	Peer-to-peer learning exchange conducted according to plan (MS12)	WP4	M19	Presentation of plan at a periodic meeting of WPs 3 and 4
14	Learnings transformed into toolkit (beta version) (MS9)	WP2	M20	D2.3
15	Data from experimentation assessed and shared (MS15)	WP4	M24	D4.2

Table 2.1. List of milestones, ordered chronologically (milestone numbers in brackets refer to numbers at the SyGMa platform).

## 2.3 Project deliverables

The following table summarizes the deliverables of DESIRE.

ID	Name	WP	Lead beneficiary	Type	Dissem. level	Delivery date
D1.1	Project Management Plan (PMP)	WP1	BXH	R	PU	M2
D1.2	Data Management Plan	WP1	BXH	DMP	PU	M6
D1.3	PMP – revision #1	WP1	BXH	R	PU	M12
D1.4	PMP – revision #2	WP1	BXH	R	PU	M24
D2.1	DESIRE Manifesto	WP2	DDC	R	PU	M4
D2.2	Set of principles and transformation questions	WP2	DDC	R	PU	M6
D2.3	DESIRE Toolkit	WP2	DDC	R	PU	M22
D2.4	DESIRE principles for holistic transformation	WP2	DDC	R	PU	M24
D2.5	DESIRE Toolkit – first prototype version	WP2	DDC	R	PU	M12





D3.1	Customization of the DESIRE principles and demonstration plans	WP3	AAU	R	PU	M14
D3.2	DESIRE site experiences and future plans	WP3	AAU	R	PU	M20
D3.3	Narratives of irresistible circular futures	WP3	AAU	R	PU	M21
D4.1	Learning and evaluation framework	WP4	POLIMI	R	PU	M6
D4.2	Monitoring and evaluation report	WP4	POLIMI	R	PU	M24
D4.3	Innovation biographies	WP4	POLIMI	R	PU	M24
D5.1	Communication & Engagement strategy	WP5	DTU	R	PU	M6
D5.2	DESIRE digital learning hub	WP5	DTU	OT HER	PU	M24
D5.3	Digital data presentation and engagement tool	WP5	DTU	R	PU	M12
D5.4	Communication & Engagement strategy – revision #1	WP5	DTU	R	PU	M12
D5.5	Communication & Engagement strategy – revision #2	WP5	DTU	R	PU	M24
D6.1	Exploitation strategy	WP6	DI	R	PU	M6
D6.2	Financial plan	WP6	BXH	R	PU	M24

Table 2.2. List of deliverables, ordered according to ID.

### 3. ORGANISATION

The consortium behind DESIRE consists of 24 partners, including two associated partners (Table 3.1). The Project Coordinator is Bloxhub (BXH), Copenhagen. The construction of the DESIRE consortium forms a differentiator for the implementation of the project and the unfolding of learnings across sites. Involved in the consortium are **research partners within SSH** (DTU, AAU, KADK, POLIMI), **pure art organisations** (Fonden Chart, NXT), organisations and companies with **technical capacity and knowledge within design, art, architecture and industry** (GXN, CER, DDC, DI, DAC), two **local authorities** (RCC, Citta di Torino), private and public organisations **directly involved in urban transformation projects** at a local level (DOMEA, KHZ, The Beach, SW-SL, BTC, KAIROS, PlusValue

Participant No.	Participant organisation name	Country
1 (coordinator)	Foreningen BLOXHUB (BXH)	DK
2	Design Society Fond / Danish Design Center (DDC)	DK



3	Dansk Industri (DI)	DK
4	Aalborg Universitet (AAU)	DK
5	Dansk Arkitektur Center (DAC)	DK
6	Denmark's Technical University (DTU)	DK
7	Knowledge Hub Zealand (KHZ)	DK
8	Domea.dk (DOMEA)	DK
9	Danske Arkitektvirksomheder (DANSKEARK)	DK
10	Center energetske ucinkovitih resitev (CER)	SI
11	GXN AS (GXN)	DK
12	RIGA CITY COUNCIL (RCC)	LV
13	POLITECNICO DI MILANO (Polimi)	IT
14	NXT ApS (NXT)	DK
15	Fonden Chart (CHART)	DK
16	Kairos Consorzio di Cooperative Sociali - Società Cooperativa sociale (KAIROS)	IT
17	COMUNE DI TORINO (CITTA DI TORINO)	IT
18	PlusValue Italy S.R.L. Societ Benefit (PlusValue)	IT
19	Samenwonen-Samenleven (SW-SL)	NL
20	Stichting The Beach (The Beach)	NL
21	Det Kongelige Danske Kunstakademis Skoler for Arkitektur, Design og Konservering (KADK)	DK
22	Blagovno Trgovinski Center (BTC)	SI
23	<i>The Really Regenerative Centre (RRC) – associated partner</i>	UK
24	<i>DARK MATTER LABORATORIES LIMITED (DML) – associated partner</i>	UK

Table 3.1. Overview of partners

### 3.1 Roles and responsibilities

The organisations have been divided into four different categories based on their roles and responsibilities.

DESIRE CONSORTIUM PARTNER ROLES AND RESPONSIBILITIES	
<b>Territorial organisations</b>	<p>Organisations deeply involved in realising transformation projects at the 8 sites. Collaborates with Coordinating organisations. Responsible for carrying out activities concerning co-designing, experimenting and learning related to the sites they are connected with, particularly in relation to WP2, WP3 and WP4. Involved in activities that concern communication and dissemination</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>• Domea.dk (Gadehavegaard, Høje-Taastrup - DK)</li> <li>• NXT (Herlev asphalt factory - DK)</li> <li>• KHZ &amp; KADK (Kalundborg - DK)</li> <li>• Riga City Council - also coordinating organisation (Riga - LV)</li> </ul>



	<ul style="list-style-type: none"> <li>• KAIROS (Cascina Falchera, Torino - IT)</li> <li>• PlusValue (MIND, Milan – IT)</li> <li>• SW-SL (Wildemans Buurt, Amsterdam - NL)</li> <li>• BTC City (Ljubljana - SI)</li> </ul>
<b>Coordinating organisations</b>	<p>Organisations closely connected with the territorial organisations. Their role is to coordinate transfer of knowledge and learnings from local level (demonstrator sites) to transnational level, and vice versa. They have a bridging role between the local and the transnational.</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>• AAU (in relation to territorial organisations in DK)</li> <li>• CER (in relation to territorial organisation in SI)</li> <li>• POLIMI (in relation to territorial organisations in IT)</li> <li>• The Beach (in relation to territorial organisation in NL)</li> </ul>
<b>Facilitating organisations</b>	<p>Project Manager and WP leaders. Responsible for setting the overall framework for the activities, and for the operation of the project and for the project deliverables. Also responsible for ensuring integration and engagement across the different work packages and across the different organisations and countries.</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>• WP1: BLOXHUB (Project Manager)</li> <li>• WP2: DDC</li> <li>• WP3: AAU</li> <li>• WP4: POLIMI</li> <li>• WP5: DTU &amp; DAC</li> <li>• WP6: DI</li> </ul>
<b>Experts</b>	<p>Organisations (companies, NGOs) specialised in key knowledge domains like art, design, circularity, architecture and systemic intervention. Involved in workshops at local and transnational level and on-site demonstrations. Their role goes beyond the role of an advisor – they will be engaged in co-creation activities with a hands-on role that supports the ambition of disturbing, challenging, and qualifying the learnings and outcomes.</p> <p>Defined as such in this consortium</p> <ul style="list-style-type: none"> <li>• DanskeArk</li> <li>• Fonden Chart</li> <li>• GXN AS</li> <li>• The Really Regenerative Centre (UK - associated partner)</li> <li>• Dark Matter Laboratories (DML) (UK - associated partner)</li> </ul>

Table 3.2. Grouping of partner roles and responsibilities

In addition to this, following concerns the tasks and responsibilities of key roles within the consortium:

**Project Manager (Coordinator):**

- Responsible for the overall project management and coordination of the decision-making processes



- Intermediary between the consortium partners and CINEA (the granting authority), including administering the financial contribution from the granting authority
- Chairs the General Assembly (GA) and the meetings in the Executive Board (EB) – prepares the agenda, proposes decisions and monitors the implementation of the project
- Monitors that the consortium partners comply with their obligations
- Collect, review, in close coordination and agreement with WP leaders and responsible organisations, and submit reports, other deliverables and specific requested documents to CINEA

**WP leaders:**

- Responsible for the planning, progress control, quality management and successful completion of their respective WP
- Keep the work package on track and report status to the PM as part of the involvement in the IHC group and in relation to reporting
- Supervise the work of the partners involved in the WP, identify problems and risks and take part in addressing them, if relevant
- Take part in meetings and discussions in the Coordination entities, primarily the Internal Horizontal Coordination group (IHC), eventually also the External Relations (ERG) group (see section 3.2 Governance structure).

**Task leaders:**

- Responsible for the planning, reporting on the progress and successful completion of the specific task, in close coordination and alignment with the responsible WP leader
- Keep track of progress and supervise the work of partners involved in the task
- Identify problems and risks related specifically to this task, and share with the WP leader

See Table 4.1 for an overview of WPs, WP leaders, tasks and task leaders.

## 3.2 Governance structure

The management structure is tied legally within the project managing organisation (BXH - PM) but built as a collaborative “mission management” team that acts exclusively and independently on behalf of the DESIRE project. The management of DESIRE requires a clear attention towards coordination between the different WPs and the different consortium roles.

The governance structure includes different executive and coordination bodies as presented in figure 3.1, with the General Assembly as the main decision-making body.



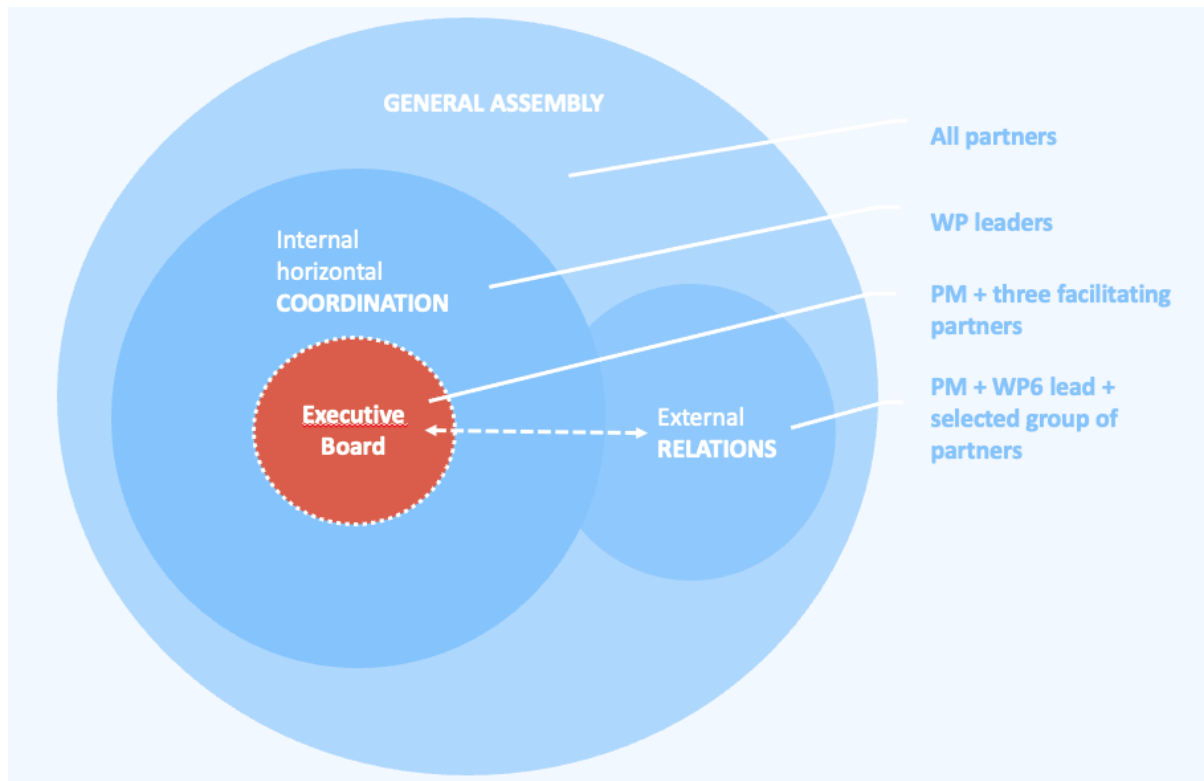


Fig. 3.1. Governance structure with key entities and roles.

Each consortium body serves a specific purpose and is established to create a smooth operation and decision-making process throughout the project period. The **executive and coordination entities** form an important arena for knowledge sharing and conflict handling at an early stage and can be viewed as ‘engines’ for discussions on strategic direction and steering options. The **decision-making body (the General Assembly)** makes decisions on issues of importance for the successful implementation of the project.

#### The main characteristics of the decision-making body:

- **GENERAL ASSEMBLY (GA)**: The ultimate decision-making body, involving all partners and chaired by the PM. Decisions that concern any element of major importance to the implementation of the project as defined in the DoA and Grant Agreement.

#### The main characteristics of the executing and coordinating bodies:

- **Executive Body (EB)**. The supervisory body for the execution of the project. Ensure a smooth execution of decisions on a daily basis. Form the intermediary entity between the coordination entities and the General Assembly.
- **Internal horizontal COORDINATION**. Ensure the coordination and alignment across the project partners and work packages.
- **External RELATIONS**. Ensures alignment across the consortium for all external relations, including conversations with the NEB Team, with other NEB partnerships, with relevant media and press, etc.

The specific roles and responsibilities as well as operating and voting modes are described in Table 3.3, based on the Consortium Agreement and the DoA.

Entity	Roles and responsibilities	Involved	Operating modes - voting rules
General Assembly (GA) (ordinary meetings)	<p>Ultimate decision-making</p> <p>PM responsible for notification, implementation and minutes</p> <p>EB involved in setting the agenda</p> <p>Decisions on content and finances, e.g. proposals for changes to Annex 1 and 2 of the Grant Agreement, and appoints members of EB</p>	All partners	<p>At least every 6 months - fixed part of every physical partner meeting</p> <p>Notification: 45 calendar days</p> <p>One vote per organisation. Quorum is when <math>\frac{2}{3}</math> of members are present or represented</p> <p>Decision by a majority of the two-thirds (<math>\frac{2}{3}</math>) of the votes cast.</p> <p>Agenda: 21 calendar days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for feedback: 15 days of receiving the minutes</p>
General Assembly (extraordinary meeting)	<p>Ultimate decision-making</p> <p>PM responsible for notification, implementation and minutes</p> <p>Partners requesting the meeting involved in setting the agenda</p>	All partners	<p>At request by the EB or <math>\frac{1}{3}</math> of the consortium</p> <p>Notification: 15 calendar days</p> <p>One vote per organisation. Quorum is when <math>\frac{2}{3}</math> of members are present or represented</p> <p>Decision by a majority of the two-thirds (<math>\frac{2}{3}</math>) of the votes cast.</p> <p>Agenda: 10 days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for feedback: 15 days of receiving the minutes</p>



Entity	Roles and responsibilities	Involved	Operating modes - voting rules
Executive Body (EB)	<p>Supervisory body for the execution of the project.</p> <p>Reports to and accountable to the GA.</p> <p>Prepare the agenda of the GA.</p> <p>PM chairs the meetings, responsible for agenda and minutes</p> <p>Minutes to be shared with GA members.</p> <p>Ensures the overall momentum, strategic direction, and deliverables of the project across the entire initiative.</p> <p>Monitors the effective and efficient implementation of the project and supports the PM in their obligations towards the granting authority.</p>	<p>PM and three facilitating organisations</p> <p>Appointed by the GA on proposal from PM</p>	<p>At least once every 3 months</p> <p>Notification: 14 calendar days</p> <p>Agenda: 7 days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for feedback: 15 days of receiving the minutes</p> <p>Agreement through consensus</p>
Internal horizontal coordination group (IHC)	<p>Coordination and alignment across partners and work packages, management of internal data collection, analysis, learning cycles, codification of common insights, and project communication.</p> <p>The PM is responsible for the overall functioning of this body, unless decided differently by the involved organisations</p>	PM and WP leaders	<p>Frequent online meetings (1-2 times monthly), based on needs and requests.</p> <p>Further operating modes are decided by the members of the IHC.</p>
External relation group	Ensures alignment and coordination across the consortium for all external relations, including conversations with other NEB projects and teams.	WP1 + WP6 leaders, consortium members representing different of the target groups	Operating modes are decided by the members of the external relation group



Entity	Roles and responsibilities	Involved	Operating modes - voting rules
	PM and WP6 leader share responsibility for managing the group	defined as key target groups for outreach; e.g. local authorities, industry and professional actors.  The specific composition of this group will evolve according to the progress of the project and the implementation of the exploitation strategy.	
Ad-hoc groups	Based on needs and requests expressed by the partners.  Roles and responsibilities to be defined in relation to expression of need	According to the role and function of the group(s)	Decisions on the operation of an ad-hoc group are taken by its members.

Table 3.3. DESIRE governance entities, roles, responsibilities and involvement

## 4. PROJECT TIMELINE

The DESIRE project has a duration of 2 years. It started on October 1st, 2022, and will conclude on September 30th, 2024. The implementation happens through three main phases:

- **The preparatory phase (M1-M6):** Preparing for on-site demonstrations, setting the frameworks for learning and evaluation, project management and communication, dissemination and exploitation activities, co-creating manifesto, principles and guidelines for testing principles
- **The experimentation phase (M7-18):** Conducting the on-site demonstrations, collect and share data via the digital learning hub, provide a prototype version of the DESIRE toolkit, learn from the experiments and adjust principles and toolkits according to the learnings, engage and involve external stakeholders, prepare for the full-scale project through outreach and scaling activities
- **The concluding phase (M19-M24):** Concluding all activities, present learnings and evaluations through the digital learning hub, finalize DESIRE principles and toolkit, strengthen activities connected with exploitation and scaling, finalize the financial plan for the full-scale project





The following GANTT-chart gives a visual overview of all WPs, tasks and deliverables. Further information can be found in table 4.1 and in the DESIRE Work Plan, and the detailed GANTT chart, Annex 2.



Fig. 4.1. GANTT-overview of the DESIRE project.

## 4.1 Responsibility assignment

The work done in the project is divided into 6 work packages (WPs). Each WP consists of different tasks. For each WP and task an organization has been defined as responsible. Details about each WP and task is provided in the Work Plan. Table 4.1 gives an overview.

WP / task	WP / task lead
WP1 Project management and administration	BXH
T1.1 Setting up the administrative foundation	BXH
T1.2 Managing and supervising administrative routines	BXH
T1.3 Finalisation	BXH
WP2 DESIRE principles and tools	DDC
T2.1 Co-creation of the DESIRE manifesto and principles	DDC
T2.2 Co-creation of HOW	DDC
T2.3 Drafting and finalizing the DESIRE toolkit and principles	DDC
WP3 On-site demonstrations	AAU
T3.1 Customizing territorial sites with DESIRE principles	AAU



T3.2 Demonstration of the DESIRE principles	AAU
T3.3 Revision and evaluation of the on-site demonstrations	AAU
WP4 Learning and evaluation	POLIMI
T4.1 Design of the learning and evaluation framework	POLIMI
T4.2 Monitoring and evaluation of the experiments	POLIMI
T4.3 Peer-to-peer learning exchange	AAU
T4.4 Innovation biographies	POLIMI
WP5 Dissemination, communication and engagement	DTU
T5.1 DESIRE's digital learning hub	DTU
T5.2 Community engagement communication	DTU
T5.3 Policy dialogue and professional stakeholders	DI
T5.4 External communication and events	DAC
T5.5 Learning experiences for a New School	POLIMI
WP6 Exploitation and scaling	DI
T6.1 Exploitation strategy and plan	DI
T6.2 Scale up: Establishing, engaging and expanding partnerships	DAC
T6.3 Scale out: nurturing and expanding the ecosystem	DI
T6.4 Long-term financial strategy and plan	BXH

Table 4.1. Overview of WPs and tasks + responsible partners

## 4.2 Schedule management

Schedule management concerns the process of ensuring that the project schedule is maintained and managed. The project overall schedule management is the responsibility of the PM; the schedule management within each WP is managed by the leader of that WP; detailed action plans for each task will be managed by the leader of that task. The different schedule management processes are therefore managed by different people depending on the level.

The monitoring is done on a monthly basis by the PM. The EB will be involved if any schedule slippage on critical tasks is identified that may jeopardize milestones or timely delivery of deliverables.

If changes occur, the PM incorporates the proposed change(s) into the DESIRE Work Plan. The Work Plan is stored at the DESIRE Google Drive Workspace, available to all consortium members. It includes a revision history log with following information to ensure adequate change management:

- The incremented version number



- The date
- The name of the person or consortium body authorizing the change
- The description of the change
- The effects of the change on the progress of the work

This table sets the framework for actions in relation to **schedule management**. Section 10. ‘Change management’ further describes the approach to deal with requests for changes. While the schedule management mainly concerns the timing of activities on a proactive basis, the Change management procedures describe the processes to manage requests for changes and how to ensure transparency and accountability regarding the content and reasons for changes.

What	How	When	By whom
Expected or needed changes in the planned implementation of activities (other than changes requiring an amendment procedure)	Consultation with IHC	When it may have an effect on work in other WPs	WP leader
Set Milestone not reachable	Consultation with IHC and in case of potential action towards CINEA involve EB	As soon as the problem occurs	WP leader
Delay of deliverables	Consultation with IHC – decision by EB	As soon as the delay is foreseen	Partner responsible for the deliverable
Partner takes over tasks from other partners	Consultation with WP leader for the concerned activity + PM	Before the actual shift in responsibility	The partners involved in shift of responsibility

Table 4.2 Action framework for schedule management

### 4.3 Adjustment of work plan

Any minor adjustments of the work plan should be discussed in the IHC group and proposals for decision should be presented for the EB, eventually discussed at the GA, if it concerns adjustments that will influence the planning or implementation of activities that involve more partners. Adjustments that may influence the overall performance and implementation of the project, whether it concerns budget, activities, or staff effort, should be communicated to the Project Officer. Major adjustments, if needed, should be addressed through an amendment procedure described in Article 39 of the Grant Agreement. The PM is responsible for performing the amendment process based on decisions by the GA, according to the Consortium Agreement.

## 5. PROJECT RESOURCES

The maximum EU contribution (and the maximum grant amount) approved for the DESIRE project is €4.754.000, at the reimbursement rate of 100%. The deducted contribution to the Mutual Insurance



Mechanism is €237.700. The pre-financing amount allocated to the consortium in the beginning of the project duration is €3.803.200. The budget is distributed among 22 beneficiaries (including the PM), with an initial 40% of each beneficiary's total budget as a pre-financing transferred by the upstart of the project. A second allocation will take place after the mid-term reporting (M12), based on spent resources.

The overview of each partner's engagement in the DESIRE project is presented in Table 2 in the DESIRE Work Plan.

## 5.1 Budget/cost management

The objective of applying cost management is to ensure that the project is completed within budget. It concerns the process of gathering, tracking and managing the financial resources throughout the project's life cycle. As the project life cycle is limited to 2 years, frequent estimates of spent resources and collection of data is needed. Summary information of spent costs is reported to the PM by all partners.

To keep track of the estimated and real budget spent by each partner, the PM will request **an internal financial report** every 3 months, eventually even every second month (e.g. during the demonstration activities - WP3). This report will consist of three parts:

1. **Indication of spent resources** for the previous 3 months - personnel costs, travel, and other direct costs
2. **Assessment of staff efforts** for the preceding 3 months - personnel costs according to Person Months spent on WPs
3. **Estimation of expenses foreseen** for the next 3 months - personnel costs and other direct costs

The PM prepares a status update every 3 months including tracking and evaluating trends and variances in the costs associated with the project in order to provide timely management reporting which will enable rapid response and mitigation to adverse trends, problem areas, progress shortfalls, potential progress or cost impacts, etc. before they become milestone impacts. By the beginning of the second half of the project period (M13-M24), the PM will request all partners to prepare a forecast for the entire remaining project period. This forecast will feed into the process of managing the remaining financial resources, with a view to potential reallocation of resources if needed.

The PM meets with the EB as needed to review planned vs. actual progress, forecasted activity, areas in need of recovery and upcoming critical milestones. This table presents the procedure for cost management:

WHAT	HOW
Every 3rd month (eventually every 2nd month)	The PM requests all partners to provide data and supporting explanations, if needed, on spent resources and estimates for spending for the following 3 months
Assessment	PM will discuss spent and estimated costs with members of the EB and share an overview with the IHC group for feedback
Consultation	If relevant and based on the discussions in the EB and IHC group, PM will consult with partners where a potential reallocation of resources may be considered



Presentation at GA	The PM will present an overview of spent resources and estimated costs for the General Assembly, including suggestions for procedures and action.
Validation	The GA will discuss and take decision on any actions to be taken, if necessary, based on the provided overview
Action	Based on the GA decision, PM will conduct a reallocation of resources, eventually initiate an amendment procedure if considered necessary

Table 5.1 Procedures for cost management

The PM ensures that the project costs and available contingency amounts are monitored continuously and that there is adequate funding to cover proposed budget changes. Use or reallocation of contingency funds must be approved by the GA, based on proposals made by the EB.

## 6. RISK MANAGEMENT

Risk Management is the identification, assessment, and prioritisation of risks to minimise, monitor and control the probability and/or impact of unfortunate events also known as threats. Since not all risks can be eliminated, mitigation strategies and contingency plans can be developed to lessen their impact if they occur.

The responsibility of managing project risks lies with the Coordinator: identified risks are tackled and alerts are raised in case any of the identified risks increases its priority (see beneath for an outline of risk analysis and prioritisation and risk monitoring, and Table 6.1 for an outline of the action framework). All activities related with the risk management are monitored by the PM with collaboration of each WP leader for specific issues relevant within every specific WP.

### 6.1 Risk management strategy

The DESIRE Risk Management strategy concerns the overall project management. It describes the approach to manage potential risks that can affect the overall progress of the project. Each WP leader is involved in identifying, analysing, prioritising and addressing risks through their involvement in the IHC group and the IHC group supports the EB in identifying risks and their potential solutions while the EB proposes decisions to be taken and monitors the execution of the decided actions to take.

The process includes following steps:

- **Risk identification.** This is the proactive process of uncovering risks which might affect the project before they turn into problems. It is an iterative process, which took its beginning at the development of the proposal and which will continue throughout the project period.
- **Risk analysis and prioritisation.** This step is the most detailed phase of the risk management process. It involves evaluating and prioritising the risks, and establishing values for the potential effect on scope, cost and/or schedule of the project. The process of analysing and prioritising is based on an assessment of *the probability or likelihood* of the risk to occur, the *ability to mitigate* the risk and the *potential effect* it may have. A qualitative evaluation method will be applied, where each risk is assessed according to defined levels (Low, Medium and High) as to probability and impact. This assessment is used for prioritising risks. Risks that are assessed to



have a medium-high likeability together with a medium-high impact are further analysed to estimate their impact on the project implementation.

- **Risk response planning.** Risk response is the process of deciding what should be done with a risk. Risk response answers two key questions: (1) who owns the risk (responsibility) and (2) what can / should be done (scope and actions). Strategies and plans are developed to minimise the effects of a risk to a point where the risk can be controlled and managed. For each major risk (i.e. risks of high probability and high impact), a risk response plan is considered and eventually developed. The concrete responses and actions should be evaluated in terms of feasibility, expected effectiveness, cost and schedule implications and the effect on the quality and performance of the actions it concerns.

The PM, together with the concerned WP leaders, is responsible for developing and evaluating different risk response strategies and plans that fit the project's circumstances. The EB prepares proposals for decisions at the GA, if considered necessary.

Finally, the risk management strategy also includes **risk monitoring and control** which is the process of keeping track of the risks and evaluating the effectiveness of the response actions. Monitoring may also provide a basis for developing additional response actions and identifying new risks and is done in a continuous manner.

An action framework is described here beneath, in Table 6.1.

Step (what)	How	By whom	When
<b>Risk identification</b>	Through observations and reflections done in relation to project activities  Risk identification will be performed on a regular basis throughout the project	All partners, but in particular the PM and WP leaders	If detected, a risk should be communicated to the PM, WP leaders or members of the EB
<b>Risk analysing and prioritising</b>	Assessing will be done through a qualitative method, first assessing the <i>probability</i> of the detected risk, and then the <i>impact</i> it may have.  Three categories will be used: High, medium and low.  Risks with a high probability and a high potential impact will be prioritised.	The PM and WP leaders  The risk analysis and prioritising will be done through a collaborative approach, aiming for consensus. In case of disagreement, the EB will prepare a proposal to be discussed and decided at the GA.	The risk analysis and prioritising will be a fixed item at EB meetings
<b>Risk response planning</b>	A first step is to settle 1) responsibility and 2) scope and action.	Determination of responsibility and scope and action are done by the EB,	Risk response planning is done in a close follow-up to the risk



Step (what)	How	By whom	When
	<p>Strategies or actions to minimise the risk are developed.</p> <p>If the risk is highly probable and is expected to impact the project, a detailed risk response plan is developed.</p>	<p>involving the WP leaders where relevant and needed.</p> <p>Strategies, actions, or risk response plans will be developed by the organisation(s) who own(s) the risk, with support from the PM and WP leaders.</p> <p>If the risk response involves partners beyond the WP leaders, the decision will be taken by the GA.</p>	analysis and prioritisation process.
<b>Risk monitoring and control</b>	A risk management document is stored at the DESIRE google workspace. It includes information about identified risks, the outcome of the analysis and prioritisation process, responsibilities and actions to be performed.	The PM is responsible for creating, updating, and maintaining the risk management document.	Whenever a EB meeting is conducted.

Table 6.1. Action framework for risk management

## 7. QUALITY MANAGEMENT

The main objective of quality management is making sure that DESIRE meets the needs it was created to meet originally, and which are described in the DoA. Quality management is the process of defining the strategy and methods the project will deploy to ensure the project's deliverables are of acceptable quality before they are delivered and to ensure that the processes and activities leading up to the deliverables are of a sufficient quality to ensure quality in deliverables. Quality management is fundamental to the success of the project, and the project adopts a methodology with three main processes:

- **Quality planning** concerns what will be defined as quality in DESIRE and what must be done to achieve the defined level of quality. The quality planning is described in the Quality Management Plan.
- **Quality assurance** concerns that the completion of activities and outputs follows agreed processes.
- **Quality control** relates to the assessment of the outputs; it is concerned with the operational activities and techniques that are used to fulfil the requirements of quality.

The **Quality Management Plan** includes following aspects:

- How the project expects to implement what has been defined as quality





- How to assure the quality of processes and outputs/deliverables
- The resources allocated
- Any additional activities necessary to carry out the quality management

Finally, **quality organisation** defines who is responsible for the quality performance at which level and where the execution of quality management is placed.

## 7.1 Quality Management Plan

	Quality of project activities (WHAT)	Quality of project deliverables (WHAT)	Quality organization (HOW)
<b>Planning</b>	The project work plan and milestones and the defined staff efforts will be followed as a baseline for the planning of the project activities at a sufficient quality level.	<p>The definition of quality is done according to following terms:</p> <ul style="list-style-type: none"> <li>• <i>Validation</i> – does the deliverable meet the need defined in the work plan?</li> <li>• <i>Verification</i> – does the deliverable comply with the requirements defined in the work plan?</li> <li>• <i>Tolerance</i> – what is the acceptable range of the result?</li> </ul>	<p>The PM is overall responsible for the quality planning.</p> <p>Each WP leader is responsible for quality planning of the respective WP</p> <p>The definition of deliverable quality is done as a collaborative process involving responsible WP leader, PM and other WP leaders as an initial step in the delivery process (figure 7.1)</p>
<b>Assurance</b>	The quality assurance of project processes and activities entails processes linked with risk management.	<p>A process for peer-reviewing deliverables has been developed (see Fig. 7.1 Deliverable process).</p> <p>Revisions of the process may be performed, if needed.</p>	<p>Quality assurance is a permanent focus area in the EB, and connects closely with the organisation of risk management.</p> <p>Any revision of the peer-review process of deliverables will be discussed with the WP leaders within the IHC.</p> <p>Each WP leader is responsible for measuring the quality of activities and processes according to the work plan and milestones and for providing updates on progress and completion of activities.</p>
<b>Control</b>	Activities and processes will be measured according to the work plan, milestones and defined	The peer-review process as described in Fig. 7.1 is expected to provide for a sufficient quality control process of deliverables.	Each WP leader is responsible for quality control of activities within the relevant WP. Identified weaknesses will be addressed collaboratively,





	<b>Quality of project activities (WHAT)</b>	<b>Quality of project deliverables (WHAT)</b>	<b>Quality organization (HOW)</b>
	<p>staff efforts on a regular and systematic basis throughout the project period.</p> <p>Weaknesses will be identified and addressed on an on-going basis.</p>	<p>However, the quality control also depends on selecting peer-reviewers with the relevant knowledge, interest and competences. The process of selecting peer-reviewers therefore forms an important part of the quality control.</p>	<p>within the EB and among the WP leaders.</p> <p>For the quality control of deliverables, the responsible partner initiates the process, supported by the PM.</p>

Table 7.1 Quality management plan



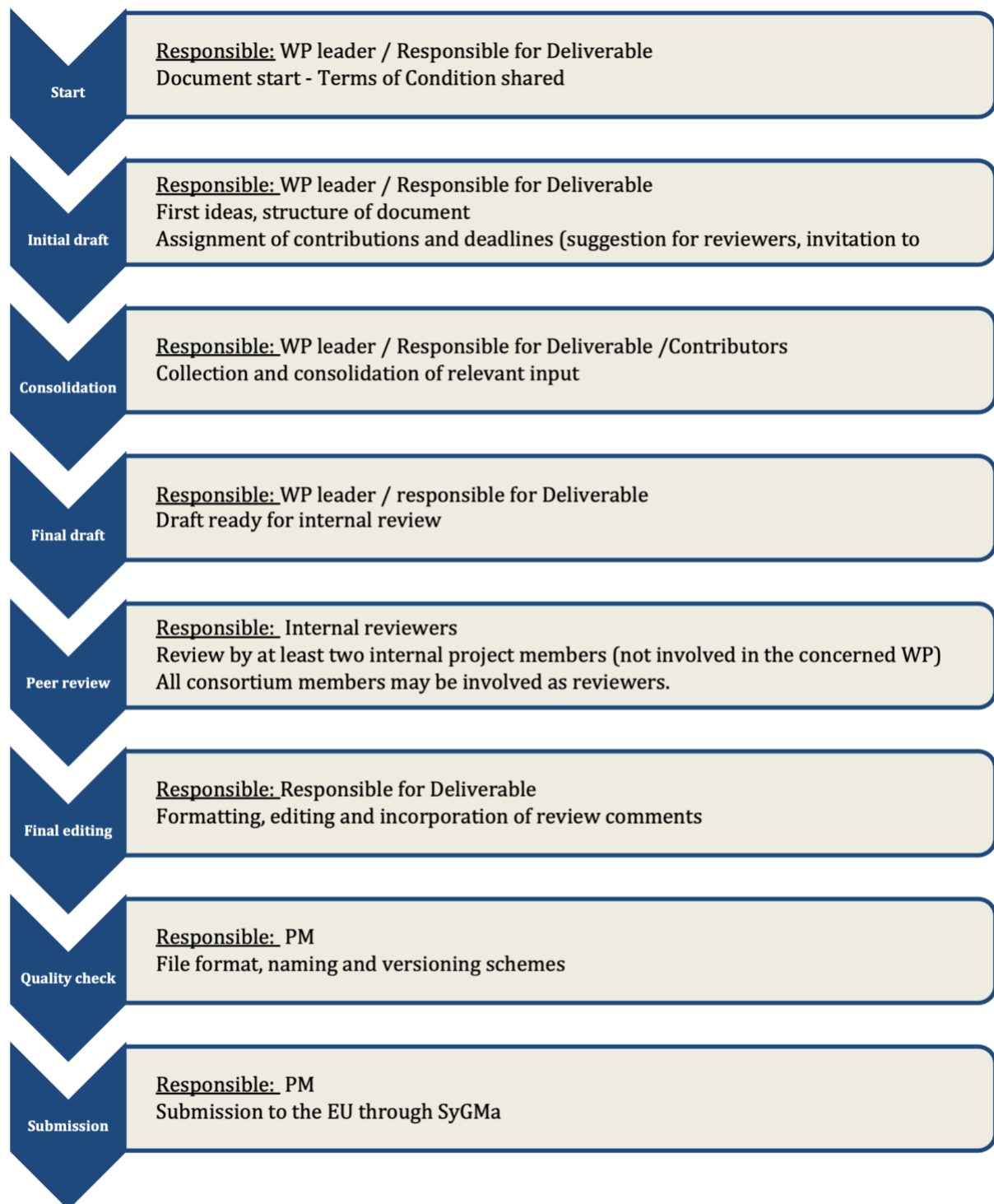


Fig. 7.1 Deliverable process



## 8. PROJECT COORDINATION RELATED COMMUNICATION

To the project's internal communication and coordination, the Project Management Plan identifies and defines the goals and channels of communication. Details can be found in the Project Handbook, which serves as the practical guide for communications throughout the life of the project, updated as required.

### 8.1 Communication channels

The main communication channels are:

- Mailing and mailing lists
- Conference calls
- Face-to-face meetings
- Digital Learning Hub (website)
- Slack for internal and fast communication

A cloud-based storage solution (Google workspace) for the collaborative creation, management and versioning of documents is chosen. The Google workspace and the Digital Learning Hub form the only online collaborative platforms, supported by the different communication channels. This will enforce the integration of the Digital Learning Hub as an active hub for collaborating, internally and externally, and therefore make the need for an online project management platform redundant.

#### 8.1.1 Contact list

An updated contact list with organisations, names of involved staff and e-mail addresses, is stored in the document deposit and maintained by the PM. It also specifies contact lists for different activities and WPs of the project.

#### 8.1.2 Mailing and mailing lists

E-mail exchange is the main instrument to share information, proposals and ideas, at least until the Digital Learning Hub is fully established and functioning. To facilitate on-going reporting activities and project teamwork, email lists have been created for different groups and project related activities. The mailing lists are maintained by the PM, and available to all the partners through the Project Handbook. Any change concerning people involved and contact details must be communicated to the PM.

#### 8.1.3 Conference calls

The project uses Microsoft Teams as its main conference call facilities. Coordination calls within the Internal Horizontal Coordination (IHC) is organized by the PM, while the responsible chairperson for the External Relations group (ERG) organises these meetings. The WP leaders involved in IHC group meets regularly once a month at fixed dates and times to share updates on progress, ensure constant coordination across WPs, address issues related to risk management, schedule management and quality management. The agenda contains fixed items and items suggested by individual members of the group or the PM. These meetings are open to any partner with an interest in issues relating to coordination.

The meeting of the ERG group follows the progress and implementation of the Exploitation and scaling strategy (D6.1). Frequency, agendas and modes of operation are defined collaboratively by the WP leader, supported by the PM.



The EB meets at least every third month or if matters request the group to meet. The regular meetings are set on fixed dates and times good time in advance. The PM decides if additional conference calls are relevant. The agenda is a mix between fixed items and items defined by the situation or proposed by any member of the consortium

Conference calls are also used for bilateral or multilateral meetings between consortium members on needs and requests. Monthly site meetings are conducted to give organisations with a key role in performing activities at the Desire lighthouse demonstrators a forum for exchange and discuss. These 'site meetings' are an addition to peer-to-peer meetings organised by facilitating organisations responsible for the on-site demonstration (WP3) and the learning and evaluation processes (WP4). Next to emails, conference calls are the mostly used communication channel in the project.

#### 8.1.4 Face-to-face meeting

Consortium meetings are planned five times during the 2-year project period. Meetings will take place at locations in close proximity to some of the 8 sites/pilots to support learning and inspiration across the consortium. The face-to-face meetings provide a platform for discussions and co-creating activities among the consortium members. Each meeting should be organised by the WP leader(s) responsible for the main parts of the content and the partner located where the meeting will take place. The PM has the overall responsibility for the coordination and timely communication of information to all partners.

#### 8.1.5 Digital Learning Hub (D5.2 – the DESIRE website)

A website will be open for interaction across the consortium and beyond, for activities that concern dissemination and engagement of external stakeholders, and for sharing and distributing learnings, ideas and proposals related to activities and outcomes of the project.

The website is managed and updated by the leaders of WP5 Communication, dissemination & communication, in close collaboration with the PM. All partners are requested to use the website as a communication channel internally and externally.

### 8.2 Document repository

The project uses Google Drive as a document repository. A DESIRE-drive has been created, and all partners have been given access to folders and all documents contained in the folders. The DESIRE-drive is managed through true 'open project' principles. Anyone with a gmail-account gets access to the drive and its content as a 'content manager', with rights to create, edit and delete documents and folders.

The Project Handbook gives all partners access to an updated folder structure. Although all partners are free to create folders, the PM will monitor the drive to ensure an overall structure that is recognizable and logical for all users.

The content in all documents in the repository must comply with the rules of GDPR. This means that no personal information can be stored without the specific consent of the person(s) involved. The responsibility to comply with this basic rule lies with the individual partner. The Data Management Plan (D1.2) outlines the framework for depositing sensitive data.

#### 8.2.1 Project templates

To ensure consistency in the DESIRE project when communicating with external stakeholders or interested parties, a set of standard templates for various communication activities will be developed. These templates include (revisions upon request):



- Deliverable template
- Standard PowerPoint
- Standard logos for the project (the project logos and the EU logo)

For internal communication the following templates will be developed:

- Cost reporting template (spent resources the last three months and estimate for resources to be spent the following three months)
- A risk management document to register identified risks, the outcome of the analysis and prioritisation process, responsible partner(s) to address the risk and status

### 8.3 Shared DESIRE calendar and virtual boards for co-creation activities

A Google calendar specifically created for DESIRE is meant for sharing information about events and activities of importance and relevance to the consortium or groups of partners. A link to the calendar has been included in the Project Handbook and colour coding has been created to ensure overview and easy navigation.

Beyond ensuring communication across the consortium of activities, events, meetings, etc, the calendar will support the reporting of activities and progress.

DESIRE provides virtual boards for online co-creation activities and for elaborating ideas, workshops, activities and planning. The online boards facilitate (cross-national) interaction and collaboration as well as the collection of data and documentation of progress.

## 9. PROJECT REPORTING

The reporting in DESIRE consists of **internal reporting** and an **official EU reporting** (midterm after M12 and final reporting).

### 9.1 Internal reporting

The internal reporting will include regular feedback at a 3-monthly basis (eventually every 2<sup>nd</sup> month) on budget spending from all project partners. The purpose of internal reporting is to provide feedback and sense of direction in the usage of allocated person-months and other budget categories. The high reporting frequency is considered necessary to ensure an efficient use of the provided means, as the project period is limited to 2 years. The details of financial reporting is presented in section 5.1 Cost/resource management.

In addition to the financial reporting, the WP leaders and partners responsible for tasks report to the IHC group on progress of activities and deliverables.

### 9.2 The reporting to the EU

Beyond the continuous reporting to the EU which concerns uploading deliverables and other outputs on a continued basis there will be two EU reports (midterm and final) which each consists of a technical and a financial part.



The **‘periodic financial part’** contains:

- An overview and explanation of the work carried out
- An overview of the progress towards the objectives of the action, including milestones and deliverables, explanations justifying any differences between work carried out and the description of the actions
- Any deliverable due within the reporting period

The **‘periodic financial report’** contains:

- A financial statement for the reporting period concerned, detailing the eligible costs for all budget categories

The PM is responsible for submitting the mid-term and final report to the EU. The reports must be submitted within 60 days following the end of the reporting period (60 days following the end of M12 and M24). All partners are responsible for completing their own financial part well in advance, and no later than 30 days after the end of the reporting period.

## 10. CHANGE MANAGEMENT

The purpose of the DESIRE change management is to document how changes are managed throughout the project life cycle. By changes is referred to requests to modify processes, plans or procedures, revise schedules, or other types of changes with an impact on the progress or activities of the project.

Processes regarding schedule management are described in section 4.2.

This table describes the approach that will be used to approve change requests. It follows a staircase-model where different levels of changes require an escalation to a higher level for review and approval.

WHAT	HOW and by WHOM
The requested changes have little or no impact on scope, budget or schedule and does not result in an increased risk for the project	The PM makes the final decisions, eventually involving the IHC for consultation.
The requested changes are expected to have a minor impact on the scope, budget or schedule of the project.	The request is discussed within the IHC group, and the decision is taken by the EB.
The requested changes may have significant impact on the scope, budget or schedule of the project.	The EB prepares a decision to be discussed in the IHC group. Based on the outcome of the discussions, the EB eventually presents it to the GA for final approval or rejection.

Table 10.1. Approach to approve requests for changes

The **impact assessment** is done as a collaborative process, involving the IHC and/or ERG groups. The assessment involves a process of:

- Identification – what needs to be changed and how?
- Validation – can the request for change be verified as valid and does it require management?
- Analysis – what is the estimated impact of the requested changes?

When the decision to change is taken, following process applies:



- Action – execute the decision, including perform revision of the work plan if necessary
- Close – make sure that action has been executed and close the change request

## 10.1 Document change process

The document change process that concerns deliverables are described in section 7.1. This chapter refers to document changes for documents linked to project management, that is:

- The Risk Management document (section 6)
- Templates for cost management (section 5.1)
- The DESIRE Work Plan (Section 2.1)

The reason for a change (both corrections and enhancements) must be clearly documented in the change history of the document. The changes must be made by ‘track-changes’ (‘suggesting’-mode) or through comments so that the new text can easily be recognized and distinguished from the previous text.

The acceptance of changes depends on the type of the document. In general, following principles should be followed:

- Changes are approved by the project entity where the content of the document is being handled
- In case of disagreement, the EB discusses the issue and decides if it needs to be settled by the GA
- The PM applies the approved changes to the document and updates the change history of the document

The Project Handbook will be updated continuously by the PM based on partners suggestions directly in the document and is therefore not included in the document change process. The latest update will always be noted at the top of the document.



# ANNEXES

## ANNEX 1 - DESIRE Project Handbook

# DESIRE - project handbook

Latest update: 30 Sept 2023

OBS! Remember to use suggesting mode if you make changes or comment :-)

### VERSION HISTORY

Number	Date	Description	Created / revised by
1.0	12/10/2022	Initial version	Aase Højlund Nielsen/PM
	25/01/2023	Minor updates of table 5.1 Project mail addresses	Aase Højlund Nielsen/PM
	21/02/2023	Elaborated description with recommendations inserted as a separate section 3.4.2	Aase Højlund Nielsen/PM
	24/03/2023	The term 'Decision-making Body' is replaced by 'Executive Board, following the phrasing in the Consortium Agreement. Fig. 2 adapted.	Aase Højlund Nielsen/PM
	18/04/2023	Section 5.6 (Communication platform: Slack) has been added and the table of content updated accordingly.	Aase Højlund Nielsen/PM
	20/06/2023	Link to AGA, version 1.0 draft 01.04.2023, added in section 4.3 Reporting	Aase Højlund Nielsen/PM
	27/06/2023	EB: changing number of facilitating organisations to three (from two)	Aase Højlund Nielsen/PM
	18/09/2023	Information about sharepoint as depository for site representatives added as new section 5.8  Change of DDC contact person WP2 (section 3.2.1)  Internal horizontal coordination (fig. 2.1 and table 2.1): Changed to include only	Aase Højlund Nielsen/PM





		<p>WP leaders - DMB changed to EB (External Relation Group)</p> <p>Budget/cost management (section 4.2) updated according to changes in the PMP (D1.3)</p> <p>Mailing list including members of the IHC group (section 5.2) deleted the IHC group includes only WP leaders who can be addressed through the wpleaders-mail address.</p>	
	28/09/2023	Section 5.3.2 - Google Calendar has been updated with instructions for how to access a shared calendar	Aase Højlund Nielsen/PM
	30/09/2023	Adjustment of fig. 2.1: members of ERG changes from 'EB + selected group of partners' to 'PM + WP6 lead + selected group of partners'	Aase Højlund Nielsen/PM

## INTRODUCTION

This document is a tool, meant to compile all relevant information regarding the operation of DESIRE. It is a dynamic document that will change over time, as our needs and learnings change. The purpose is to make it easy for everyone to navigate the project infrastructure, to know what to do when and how.

It is an internal tool, targeting the DESIRE consortium. It should be used as a 'handbook', not as a document to read from page 1 and onwards. Therefore, the document is provided with links to guide you easily from one section to another.

Most importantly, YOU are encouraged to contribute to the development of this document by simply making additions and suggestions, preferably by using 'suggesting' mode or by inserting comments. Then the document becomes alive and will reflect whatever needs the consortium has.

The content of DESIRE Project Handbook builds on the proposal/Description of Action, the Grant Agreement and the [Consortium Agreement](#). It is subject to these three documents in cases where there may be inconsistency or doubt.

## TABLE OF CONTENT

<b>INTRODUCTION</b>	<b>2</b>
<b>TABLE OF CONTENT</b>	<b>2</b>
<b>0. LIST OF ACRONYMS</b>	<b>3</b>
<b>1. TERMINOLOGY</b>	<b>4</b>
<b>2. PROJECT ORGANISATION</b>	<b>6</b>
2.1 Roles and responsibilities	6
2.2 Conflict management	8
	<b>33</b>



2.3 Change management (of the project handbook)	9
<b>3. PROJECT SCHEDULE</b>	<b>9</b>
3.1 EU project platform	10
3.2 WPs and involved partners	10
3.2.1 WP leaders	11
3.3 Gantt chart	12
3.4 Schedule management	12
3.4.1 Production timeline (Deliverables)	12
3.4.2 Preparing a deliverable	14
3.5 Adjustment of work plan	15
3.5.1 Amendment procedures	15
<b>4. PROJECT RESOURCES AND MANAGEMENT</b>	<b>15</b>
4.1 Available resources (budget)	16
4.2 Budget/cost management	16
4.3 Reporting	17
4.3.1 Internal reporting	17
4.3.2 Reporting to the EU	17
4.3.2.1 Continuous reporting	17
4.3.2.2 Periodic reporting	17
4.4 Administrative requirements	18
<b>5. PROJECT COMMUNICATION (internal)</b>	<b>18</b>
5.1 Mails and mailing lists	19
5.2 Online meetings	19
5.3 Google workspace	20
5.3.1 Project templates	20
5.3.2 Project calendar	20
5.4 Board(s)	21
5.5 Project website	21
5.6 Communication platform: Slack	21
5.7 EU logos and guidelines for external communication	22
5.8 Sharepoint as data repository across the sites	22

## LIST OF TABLES

<a href="#">Table 0.1</a>	List of acronyms
<a href="#">Table 1.1</a>	Consortium terminology
<a href="#">Table 2.1</a>	DESIRE governance entities
<a href="#">Table 2.2</a>	Conflict management
<a href="#">Table 3.1</a>	WPs and WP involvement
<a href="#">Table 3.2</a>	Contact details on WP leaders / co-leaders
<a href="#">Table 3.3</a>	Action framework for schedule management
<a href="#">Table 3.4</a>	Production timeline (deliverables)
<a href="#">Table 4.1</a>	Procedures for cost management
<a href="#">Table 4.2</a>	Documentation of costs



[Table 5.1](#) Project mail addresses**LIST OF FIGURES**[Fig. 2.1.](#) Governance and management structure[Fig. 3.1.](#) SyGMa (EU project platform)[Fig. 3.2](#) Deliverable process[Fig. 5.1.](#) Colour coding - the DESIRE calendar**0. LIST OF ACRONYMS**

AGA	Annotated Grant Agreement
CA	Consortium Agreement
CINEA	Climate, Infrastructure and Environment Agency - representing the 'granting authority', responsible for managing the DESIRE project from the granting authority side.
DoA	Description of Action
EB	Executive Board
GA	General Assembly
IHC	Internally horizontal coordination
PM	Project manager
PMs	Person months
WP	Work package

Table 0.1 List of acronyms

**1. TERMINOLOGY**

Key concepts and how we understand them in this context	
<b>Territorial organisations</b>	<p>Organisations deeply involved in realizing transformation projects at the 8 sites. Collaborates with Coordinating organisations. They engage in activities concerning co-designing, experimenting and learning related to the sites they are connected with, particularly in relation to WP2, WP3 and WP4</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>- Domea.dk (Gadehavegaard, Høje-Taastrup - DK)</li> <li>- NXT (Herlev asphalt factory - DK)</li> <li>- KHZ &amp; KADK (Kalundborg - DK)</li> <li>- Riga City Council - also coordinating organisation (Riga - LV)</li> </ul>



	<ul style="list-style-type: none"> <li>- KAIROS (Cascina Falchera, Torino - IT)</li> <li>- PlusValue (MIND, Milan – IT)</li> <li>- Stichting Samenwonen-Samenleven (Wildemansbuurt, Amsterdam - NL)</li> <li>- BTC City (Ljubljana - SI)</li> </ul>
<b>Coordinating organisations</b>	<p>Organisations closely connected with the territorial organisations. Their role is to coordinate transfer of knowledge and learnings from local level (demonstrator sites) to transnational level, and vice versa. They have a bridging role between the local and the transnational.</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>- AAU (in relation to territorial organisations in DK)</li> <li>- CER (in relation to territorial organisation in SI)</li> <li>- POLIMI (in relation to territorial organisations in IT)</li> <li>- The Beach (in relation to territorial organisation in NL)</li> </ul>
<b>Facilitating organisations</b>	<p>Project Manager and WP leaders. Responsible for setting the overall framework for the activities, and for the operation of the project and for the project deliverables. Also responsible for ensuring integration and engagement across the different work packages and across the different organisations and countries.</p> <p>Defined as such in this consortium:</p> <ul style="list-style-type: none"> <li>- Se list of WP leaders</li> </ul>
<b>Experts</b>	<p>Organisations (companies, NGOs) specialised in key knowledge domains like art, design, circularity, architecture and systemic intervention. Involved in workshops at local and transnational level and on-site demonstrations. Their role goes beyond the role of an advisor – they will be engaged in co-creation activities with a hands-on role that supports the ambition of disturbing, challenging and qualifying the learnings and outcomes.</p> <p>Defined as such in this consortium</p> <ul style="list-style-type: none"> <li>- Danske Ark (DK)</li> <li>- Fonden Chart (DK)</li> <li>- GXN AS (DK)</li> <li>- The Really Regenerative Centre (UK - associated partner)</li> <li>- Dark Matter Laboratories (UK - associated partner)</li> </ul>
<b>Project Manager (PM)</b>	<p>Also called Project Coordinator. The legal entity acting as the intermediary between the consortium and the Granting Authority (European Commission/CINEA)</p> <ul style="list-style-type: none"> <li>- PM: Bloxhub</li> </ul>
<b>WP leaders</b>	<p>Facilitating organisations with responsibility for a work package. Responsibility includes the overall progress and conclusion of deliverables.</p> <p>WP leaders</p> <ul style="list-style-type: none"> <li>- WP1: BLOXHUB (PM) (DK)</li> <li>- WP2: DDC (DK)</li> <li>- WP3: AAU (DK)</li> <li>- WP4: POLIMI (IT)</li> <li>- WP5: DTU and DAC (co-leading - DK)</li> <li>- WP6: DI (DK)</li> </ul>

Table 1.1. Consortium terminology



## 2. PROJECT ORGANISATION

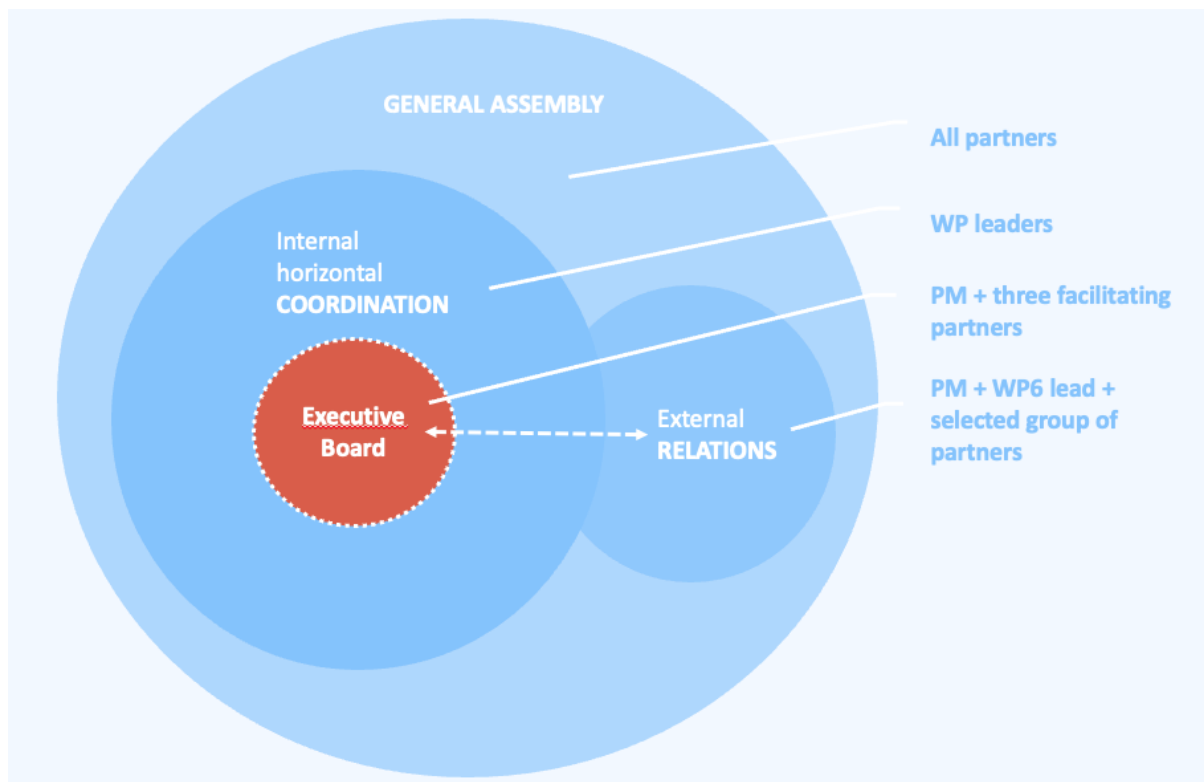


Fig. 2.1. Governance and management structure

### 2.1 Roles and responsibilities

The roles and responsibilities and the operating modes and voting rules are based on the Consortium Agreement and the DoA.

Entity	Roles and responsibilities	Involved	Operating modes - voting rules
General Assembly (GA) (ordinary meetings)	<p>Ultimate decision-making</p> <p>PM responsible for notification, implementation and minutes</p> <p>EB involved in setting the agenda</p> <p>Decisions on content and finances, e.g. proposals for changes to Annex 1 and 2 of the Grant Agreement, and appoints members of EB</p>	All partners	<p>At least every 6 months - fixed part of every physical partner meeting</p> <p>Notification: 45 calendar days</p> <p>One vote per organisation. Quorum is when <math>\frac{2}{3}</math> of members are present or represented</p> <p>Decision by a majority of the two-thirds (<math>\frac{2}{3}</math>) of the votes cast.</p> <p>Agenda: 21 calendar days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for</p>

Entity	Roles and responsibilities	Involved	Operating modes - voting rules
			feedback: 15 days of receiving the minutes
General Assembly (extraordinary meeting)	<p>Ultimate decision-making</p> <p>PM responsible for notification, implementation and minutes</p> <p>Partners requesting the meeting involved in setting the agenda</p>	All partners	<p>At request by the EB or <math>\frac{1}{3}</math> of the consortium</p> <p>Notification: 15 calendar days</p> <p>One vote per organisation. Quorum is when <math>\frac{2}{3}</math> of members are present or represented</p> <p>Decision by a majority of the two-thirds (<math>\frac{2}{3}</math>) of the votes cast.</p> <p>Agenda: 10 days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for feedback: 15 days of receiving the minutes</p>
Executive Board (EB)	<p>Supervisory body for the execution of the project.</p> <p>Reports to and accountable to the GA.</p> <p>Prepare the agenda of the GA.</p> <p>PM chairs the meetings, responsible for agenda and minutes</p> <p>Minutes to be shared with GA members.</p> <p>Ensures the overall momentum, strategic direction, and deliverables of the project across the entire initiative.</p> <p>Monitors the effective and efficient implementation of the project and supports the PM in their obligations towards the granting authority.</p>	<p>PM and three facilitating organisations</p> <p>Appointed by the GA on proposal from PM</p>	<p>At least once every 3 months</p> <p>Notification: 14 calendar days</p> <p>Agenda: 7 days before the meeting</p> <p>Minutes: Within 10 days of the meeting - deadline for feedback: 15 days of receiving the minutes</p> <p>Agreement through consensus</p>
Internal horizontal coordination	Coordination and alignment across partners and work packages, management of internal data collection, analysis, learning cycles, codification of common insights, and project communication.	PM and WP leaders	<p>Frequent online meetings (1-2 times monthly), based on needs and requests.</p> <p>Further operating modes are decided by the members of the IHC.</p>



Entity	Roles and responsibilities	Involved	Operating modes - voting rules
	The PM is responsible for the overall functioning of this body, unless decided differently by the involved organisations		
External relation group	Ensures alignment and coordination across the consortium for all external relations, including conversations with other NEB projects and teams.  PM and WP6 leader share responsibility for managing the group	WP1 + WP6 leaders, consortium members representing different of the target groups defined as key target groups for outreach; e.g. local authorities, industry and professional actors.  The specific composition of this group will evolve according to the progress of the project and the implementation of the exploitation strategy.	Operating modes are decided by the members of the external relation group
Ad-hoc groups	Based on needs and requests expressed by the partners.  Roles and responsibilities to be defined in relation to expression of need	According to the role and function of the group(s)	Decisions on the operation of an ad-hoc group are taken by its members.

Table 2.1. DESIRE governance entities

## 2.2 Conflict management

What to do if an issue turns into a conflict? Whom to address and what are the procedures?

Settlement of disputes is described at generic level in article 11.8 in the Consortium Agreement - this pathway is meant to guide you on what to do, if a conflict arises. Other approaches may also be applied, if considered relevant.

What do we mean by conflict?	A dispute or disagreement among members of the consortium, that cannot be solved amongst the involved.
Whom to address?	A. The PM in case the conflict does not include the PM B. Members of the EB, if PM is part of the conflict
How to?	<p>If the PM is not part of the conflict:</p> <ul style="list-style-type: none"> <li>- contact PM for an elaboration of the conflict, its background and to initiate a dialogue on how to settle the conflict</li> <li>- Consider involving the EB to inform and to identify solutions, or</li> <li>- Involve a selected group of trusted consortium members to discuss potential solutions and steps forward</li> <li>- Establish dialogue with the involved parties</li> </ul> <p>If PM is part of the conflict:</p> <ul style="list-style-type: none"> <li>- Contact one or more of the members of the EB to discuss and</li> </ul>



	identify ways forward to settle the conflict <ul style="list-style-type: none"> <li>- Consider involving a larger group of consortium members for identifying solutions</li> <li>- Eventually request for an extraordinary GA to have the conflict settled among the consortium</li> </ul>
Which principles do we adhere to in conflict management?	<p><b>This needs to be settled by the entire consortium at a GA.</b></p> <p>Examples of principles and values:</p> <ul style="list-style-type: none"> <li>- Openness towards different perspectives</li> <li>- Respect and transparency</li> <li>- Solutions aiming at leaving each of the involved parties with an acceptable outcome and way forward</li> </ul>

Table 2.2. Conflict management

## 2.3 Change management (of the project handbook)

This document is an **open document**, a work-in-progress. It means that YOU as a member of the DESIRE consortium are encouraged to make suggestions, add elements, change and edit, if you consider it relevant or necessary.

Please follow these guidelines:

- **Make a comment:** Mark what you want to comment or change, insert a comment and include the e-mail address of Aase ([aho@bloxhub.org](mailto:aho@bloxhub.org)) with an @ as prefix
- **Make a change or revision:** Choose 'suggesting' when you make your changes


The PM will monitor the document and act on suggestions for changes, if needed by involving the EB, eventually also the GA.

## 3. PROJECT SCHEDULE

This chapter concerns the planning and overview of WPs and activities and who is involved where and when. It is based on the DoA and the information at the EU project platform (SyGMa)

### 3.1 EU project platform

DESIRE is managed from SyGMa (System for Grant Management) - this is where you will be asked to upload deliverables and report on spent resources. The platform can be accessed through the login function at [this site](#).

The SyGMa page looks like this and is accessed by clicking on  - button on the 'Manage project' site which you enter from the 'Action'-button after login.





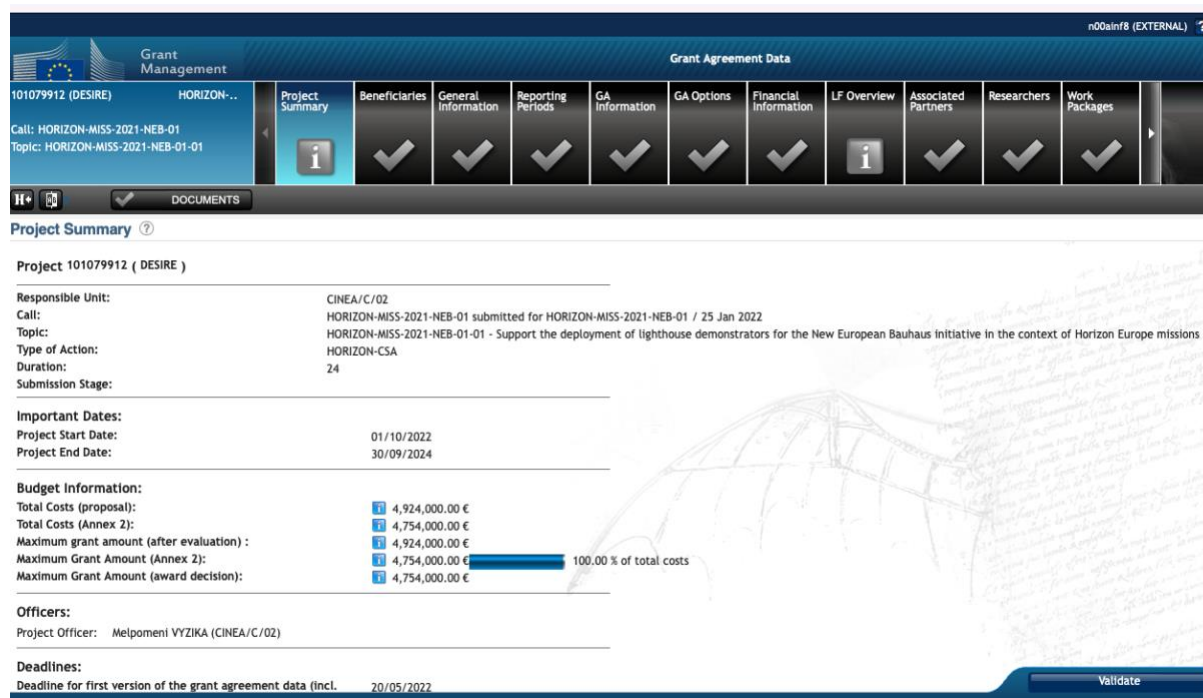


Fig. 3.1. SyGMA (EU project platform)

### 3.2 WPs and involved partners

No.	Name	WP leader	Main involvement (allocated PMs)	Minor involvement
WP1	Project management and coordination	BLOXHUB	DDC, DI, AAU, DTU, CER, RCC, POLIMI, The Beach	All partners will have minor management tasks, e.g. in relation to administration and reporting
WP2	Co-design principles and tools	DDC	AAU, KHZ, Domea.dk, DANSKEARK, CER, GXN, RCC, POLIMI, NXT, Fonden Chart, KAIROS, PLUSVALUE, SW-SL, The Beach, KADK, BTC, RRC, DML	DAC, DTU, DI, Bloxhub, Citta di Torino will be involved mainly in relation to partner meetings and follow-up
WP3	On-site demonstrations	AAU	DDC, DI, KHZ, Domea.dk, DANSKEARK, CER, GXN, RCC, POLIMI, NXT, Fonden Chart, KAIROS, Citta di Torino, PLUSVALUE, SW-SL, The Beach, KADK, BTC, RRC, DML	Bloxhub, DTU, DAC only through activities relating to WP1 and WP5
WP4	Learning and evaluation	POLIMI	DDC, DI, AAU, KHZ, Domea.dk, DANSKEARK, CER, GXN, RCC, NXT, Fonden Chart, KAIROS, PLUSVALUE, SW-SL, The Beach	Bloxhub, DTU, DAC only through activities relating to WP1 and WP5



			Beach, KADK, BTC, RRC, DML	
WP5	Dissemination, communication and engagement	DTU & DAC	BLOXHUB, DDC, DI, CER, RCC, POLIMI, The Beach	All partners will be involved in communicating and disseminating DESIRE activities and results
WP6	Exploitation and scaling	DI	BLOXHUB, DDC, DAC, DTU, CER, GXN, RCC, Citta di Torino, PLUSVALUE, The Beach	Other partners will be involved occasionally in relation to partner meetings or communication activities

Table 3.1. WPs and WP involvement

### 3.2.1 WP leaders

Who to contact?

WP	Organisation	Contact person	Email
1	BLOXHUB	Aase Højlund Nielsen	<a href="mailto:aho@bloxhub.org">aho@bloxhub.org</a>
2	DDC	Cecilie Schulze	<a href="mailto:scs@ddc.dk">scs@ddc.dk</a>
3	AAU	Olivia Harre	<a href="mailto:otha@create.aau.dk">otha@create.aau.dk</a>
4	POLIMI	Alessandro Deserti	<a href="mailto:alessandro.deserti@polimi.it">alessandro.deserti@polimi.it</a>
5	DTU DAC	Martin Brynskov Kika Krista Kjærside	<a href="mailto:mbryn@dtu.dk">mbryn@dtu.dk</a> <a href="mailto:kkk@dac.dk">kkk@dac.dk</a>
6	DI	Henriette Thuen	<a href="mailto:htu@di.dk">htu@di.dk</a>

Table 3.2 Contact details on WP leaders / co-leaders

### 3.3 Gantt chart

This is a [link to the Gantt chart](#) with a complete overview of the project plan. The accessed Gantt chart is always represented as the last version.

The Gantt chart supplements the information at the EU project platform (SyGMA).

### 3.4 Schedule management

Schedule management concerns the process of ensuring that the project schedule is maintained and managed. The PM is responsible for gathering information about status but each WP leader is responsible for managing tasks that concern their WP. The monitoring is done on a monthly basis, and the work plan is updated, if needed.

The schedule management happens within the IHC group and the Gantt chart will be updated accordingly. By larger changes, e.g. delays in deliverables, change of responsibility for tasks or any other change that may affect the Description of Action, [an amendment procedure](#) will be required.

This table sets the framework for actions in relation to schedule management:



What	How	When	By whom
Changes in the planned implementation of activities (other than changes requiring an amendment procedure)	Consultation IHC	When it may have an effect on work in other WPs	WP leader
Set Milestone not reachable	Consultation with IHC and in case of potential action towards CINEA involve EB	As soon as the problem occurs	WP leader
Delay of deliverables	Consultation with IHC – decision by EB	As soon as the delay is foreseen	Partner responsible for the deliverable
Partner takes over tasks from other partners	Consultation with WP leader for the concerned activity + PM	Before the actual shift in responsibility	The partners involved in shift of responsibility

Table 3.3 Action framework for schedule management

### 3.4.1 Production timeline (Deliverables)

DESIRE will run a process for internal reviews of deliverables to ensure high quality. Fig. 3.2 presents the process, and Table 3.x the timeline seen from delivery date and backwards.



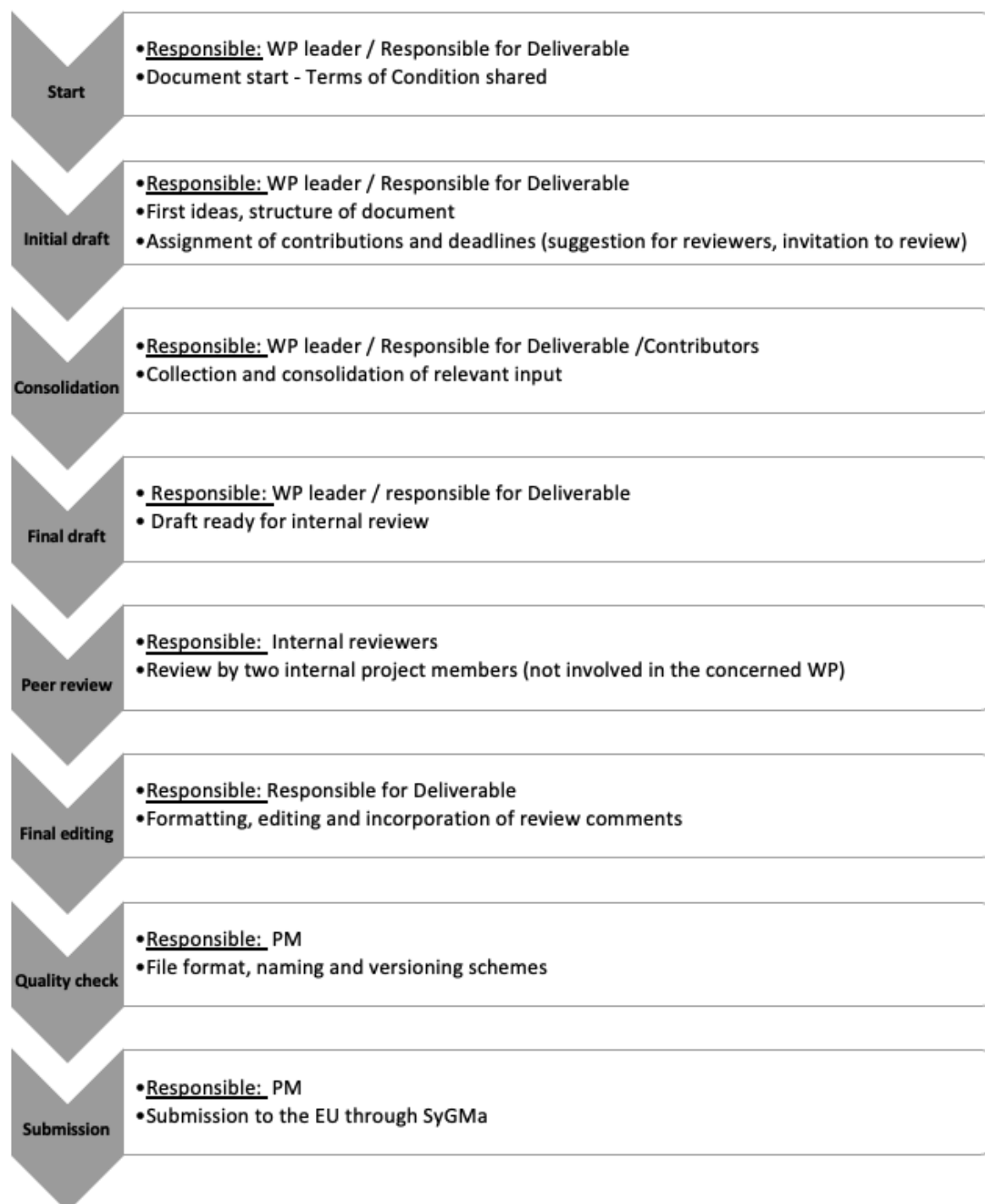


Fig. 3.2 Deliverable process

Start	To be decided by the PM and responsible WP leader / deliverable leader
Initial draft	-



Consolidation	-
Final draft	Document ready 4 weeks before dd
Peer review	Reviews done 2 weeks before dd
Final editing	Document updated 1 week before dd
Quality check	-
Submission	Delivery date (dd)

Table 3.4 Production timeline (deliverables)

### 3.4.2 Preparing a deliverable

This section unfolds fig. 3.2 and table 3.4, and it aims to support beneficiaries in preparing a deliverable before the review process. It includes suggestions and recommendations - however, the partner responsible for a deliverable may choose a different approach or structure.

#### *Context notice*

Deliverables typically take the form of a report, most often defined as public, which means that it will be published at the [CORDIS platform](#), the European Commission's primary source of results from the projects funded by the EU's framework programmes for research and innovation. The Horizon Europe programme and the CORDIS platform is accessed by all with an interest in EU-funded research, and this sets a standard for the content and structure of a deliverable.

#### *Structure*

It helps those who read (and evaluate) a deliverable that the structure includes recognizable elements. The readers (and evaluators) of a deliverable read (or assess) it from a research background. A structure that resembles what a researcher normally meets in research-based publications eases their perception of the content.

#### *Metadata (mandatory)*

A report must include metadata (structural, descriptive and administrative metadata) that support users in assessing the content of the deliverable. Structural and administrative metadata is included in the cover page which consists of tables with the required information.

Descriptive metadata, e.g. title, author, abstract, keywords, must also be included before the Table of Content. Following information is regarded as descriptive metadata:

- Version History (mandatory): Presenting an overview of different versions of the document, the dates and authors
- Abbreviations (if relevant)
- Abstract - in particular in long documents, sometimes also named as 'executive summary'
- Keywords (if relevant)

#### *Table of Content*

Creating the table of contents forms the initial work on a deliverable. When it has been prepared, it should be shared with the identified reviewers for feedback and suggestions for changes. The feedback helps the partner responsible for preparing the deliverable to organize the data and content into a structure that gives sense to researchers and potential others. The review of the Table of Content also allows the reviewers to address at an early stage what may be missing and therefore helps the partner responsible for the deliverable to include this information or data.



The table of content should be reviewed at least one month before the due date of the deliverable to give the responsible partner time to include eventual missing information or data.

Beyond the different texts part of the deliverable, the table of content should also include a list of figures (if relevant), a list of tables (if relevant) and annexes (if relevant).

#### *Content*

The content of the deliverable is defined according to the objectives and tasks that the deliverable addresses. However, certain elements are important to guide the reader/evaluator when accessing the document:

- *Introduction:* A short first section that introduces the document, what it is and what the purpose is, the context it is part of and other relevant information to set the scene for the content
- *Overview of the project:* A short introduction to DESIRE and the objectives of the project to set a framework for the deliverable.
- *Data:* Description of the data being collected and analysed
- *Methodology:* Description of the methods being used to collect and analyse the data
- *Conclusion:* Summary of the analysis and key findings of the work carried out

In addition to these sections, the table of content should include chapters presenting the output - in our case: The Manifesto, the Principles, the Toolkit, the Narratives, etc.

### 3.5 Adjustment of work plan

The [work plan](#) will be adjusted according to the progress of the project. The progress is discussed on a frequent basis in the EB and the IHC groups and decisions on adjustments are taken at the General Assembly or in writing by the entire consortium (see section 6.2.3 in the CA). See also [section 3.4](#) for descriptions of what to do if adjustments are needed.

If an adjustment is expected to affect the overall project description (Description of Action as included in the Grant Agreement), an **amendment procedure** has to be initiated.

#### 3.5.1 Amendment procedures

Amendment procedures must be initiated if the adjustment of the work plan, eventually also parts of the budget, will change what is written in the Grant Agreement. Amendment procedures involve the European Commission/CINEA and require at least 3-4 weeks processing time.

The PM is responsible for performing the amendment process based on decisions by the GA (see CA, section 6.3.1.2).

## 4. PROJECT RESOURCES AND MANAGEMENT

This chapter guides you through any issues and requirements relating to budget, budget management, reporting and documentation.

### 4.1 Available resources (budget)

Details about allocated resources to each beneficiary (partner with funding) can be found at [SyGMa](#). E.g. choose 'Financial information' to get an overview of the total budget - then click on individual partners for financial information related to this specific partner.

### 4.2 Budget/cost management



The objective of applying cost management is to ensure that the project is completed within budget. It concerns the process of gathering, tracking and managing the financial resources throughout the project's life cycle. As the project life cycle is limited to 2 years, frequent estimates of spent resources and collection of data is needed. Summary information of spent costs are rolled up from task level to the project level and involves all partners.

At a practical level, it means that the PM will request **an internal financial report** every 3 months, sometimes even every second month (e.g. during the demonstration activities - WP3).<sup>1</sup> This report will consist of three parts:

- 1) **Indication of spent resources** for the previous 3 months - personnel costs, travel, and other direct costs
- 2) **Assessment of staff efforts** for the preceding 3 months - personnel costs according to Person Months spent on WPs
- 3) **Estimation of expenses foreseen** for the next 3 months - personnel costs and other direct costs

By the beginning of the second half of the project period (M13-M24), the PM will request all partners to prepare a forecast for the entire remaining project period. This forecast will feed into the process of managing the remaining financial resources, with a view to potential reallocation of resources if needed.

The PM will provide a template for this.

This table presents the procedure for cost management:

WHAT	HOW
Every 3rd month (eventually every 2nd month)	The PM requests all partners to provide data and supporting explanations, if needed, on spent resources and estimates for spending for the following 3 months
Assessment	PM will discuss spent and estimated costs with members of the EB and share an overview with the IHC group for feedback
Consultation	If relevant and based on the discussions in the IHC group, PM will consult with partners where a potential reallocation of resources may be considered
Presentation at GA	The PM will present an overview of spent resources and estimated costs for the General Assembly, including suggestions for procedures and action.
Validation	The GA will discuss and take decision on any actions to be taken, if necessary, based on the provided overview
Action	Based on the GA decision, PM will conduct a reallocation of resources, eventually initiate an amendment procedure if considered necessary

Table 4.1 Procedures for cost management

## 4.3 Reporting

<sup>1</sup> The PM may also request a monthly update from individual partners, for instance if we foresee a risk of not being able to spend the allocated resources. This decision will be taken in close collaboration with the individual partner(s)





The reporting in DESIRE consists of an internal reporting which aims at providing the PM with a continued overview of spent resources in order to be able to adjust the budget accordingly, if necessary. In addition to the internal reporting, the PM reports to the EU - this reporting has its very own and specific procedures. The following presents how each type of reporting will be conducted.

The Annotated Grant Agreement document may be a good place to start if you need to understand the Grant Agreement and which types of costs are eligible. Latest version can be accessed through this [link](#).

#### 4.3.1 Internal reporting

The PM will monitor the spending continuously. In general, the PM will require information about spent resources at least once every third month. In some cases, the monitoring may be done every second month, in close collaboration with the concerned partner(s).


Find further information in [section 4.2](#)

#### 4.3.2 Reporting to the EU

The reporting to the EU is different from the internal reporting. There are two types of reporting to the EU:

1. Continuous reporting
2. Periodic reporting

##### 4.3.2.1 Continuous reporting

Reporting on the progress of the action (e.g. deliverables, milestones, outputs/outcomes, etc), which is done at the EU project platform (SyGMA) in the Portal Continuous Reporting tool. Go to 'Manage project' from the project landing page, and click on  This mainly **concerns WP leaders**, supported by the PM.

##### 4.3.2.2 Periodic reporting

The periodic reporting will be done twice

1. Mid-term (M12)
2. Final (M24)

It consists of a technical part and a financial part. The **technical part** includes an overview of the action implementation. The **financial part** includes a statement on the use of the previous prefinancing payment.

The PM is responsible for submitting the Mid-term and Final report to the EU. However, **all partners are responsible** for completing their **own Financial part** (financial statement) at SyGMA. The PM will inform about the procedures and deadlines in due time.

#### 4.4 Administrative requirements

According to Article 7.1.2 in the CA, each partner 'shall be solely responsible for justifying its costs with respect to the Project towards the Granting Authority' in accordance with its own usual accounting and management principles and practices. However, the following table presents some key points regarding documentation for spent costs.

Cost item	How to	Ref. to GA and AGA
-----------	--------	--------------------





Personnel costs	Timesheets, monthly basis - paper or computer-based Signed by employee and manager (responsible employee) monthly (evt. digitally) Description of activities with reference to WP and task numbers or Deliverables	Article 6.2.A (calculation) Article 20 (record keeping)
Travel, accommodation and subsistence	Documentation of travel expenses, e.g. tickets, bills from hotels, restaurants Any other documents that support your actual participation in the activity	Article 6.2.C.1 and Article 20 (record keeping)
Other goods, works and services	Invoices with a clear reference to DESIRE Documents to support the relevance of the costs, e.g. workshop program, event agenda, etc.	Article 6.2.C.3 and Article 20 (record keeping)
Equipment	Only depreciation costs can be covered. The depreciation must be done in accordance with your usual accounting practices The depreciable amount must be allocated on a systematic basis on its useful life, e.g. by 25% or 10% per year The depreciation must be calculated for each project period, in DESIRE for the first and the second year. Documents that describe the depreciation practice in your organisation Invoice for the purchase or renting	Article 6.2.C.2 and Article 20 (record keeping)
Internally invoiced goods, works and services	Invoices or documents supporting the claim Documents to support internally invoicing as part of your organisation's practice	Article 6.2.D.2 and Article 20 (record keeping)

Table 4.2 Documentation of costs

Records must be **kept for 5 years after final payment**.

## 5. PROJECT COMMUNICATION (internal)

In DESIRE, we will be using different communication means for internal communication:

- Mails and mailing groups
- Conference calls (online meetings)
- Face-to-face meetings
- Slack (communication platform for internal use)

### 5.1 Mails and mailing lists

**A main mailing list** is created and maintained by the PM. An updated version is available through [this link](#).

Following mailing groups have been established. Additional groups may be added on request. PM and selected partners are responsible for creating and maintaining the mailing groups - please add a comment or a suggestion by using the 'suggesting' mode if you want a mailing group added.

<a href="mailto:desire_all@bloxhub.org">desire_all@bloxhub.org</a>	Reaches the entire consortium - be careful when you use it in order not to 'spam' people!
--	---



<a href="mailto:desire_wpleaders@bloxhub.org">desire_wpleaders@bloxhub.org</a>	All WP leaders and co-leaders
<a href="mailto:desire_sites@bloxhub.org">desire_sites@bloxhub.org</a>	All organisations related to the demonstrator sites (territorial organisations, coordinating organisations)
<a href="mailto:desire_comm@bloxhub.org">desire_comm@bloxhub.org</a>	Representatives from all organisations with a communication role in DESIRE
<a href="mailto:desire_eb@bloxhub.org">desire_eb@bloxhub.org</a>	Members of the Executive Board
<a href="mailto:desire_ihc@bloxhub.org">desire_ihc@bloxhub.org</a>	Members of the Internal Horizontal Coordination group
<a href="mailto:desire_wp5@bloxhub.org">desire_wp5@bloxhub.org</a>	Organisations involved in WP5-issues (DTU, DAC, DI, BLOXHUB)
<a href="mailto:desire_experts@bloxhub.org">desire_experts@bloxhub.org</a>	Organisations defined as 'experts' in DESIRE (Fonden Chart, GXN, DANSKEARK, DML, RRC)
<a href="mailto:desire_contact@bloxhub.org">desire_contact@bloxhub.org</a>	Goes to Hanne Kokkegaard, DTU - WP5, and Aase Højlund Nielsen, BLOXHUB - PM. To be used for general access for external stakeholders.
<a href="mailto:desire_admin@bloxhub.org">desire_admin@bloxhub.org</a>	Staff primarily involved in administrative tasks. If no one has been defined as admin person the contact person from the organisation is included in the mail group.

Table 5.1 Project mail addresses

**Recommendations for communication by mail:**

- ★ Include the word 'DESIRE' in the subject field to make it easier for the recipients to sort their mails
- ★ Be careful when you use 'reply-all' - is your answer relevant to all?
- ★ Use links to documents stored at the DESIRE workspace instead of attachments - it reduces the risk of version confusion

## 5.2 Online meetings

Online meetings will be done through Teams. Please download the Teams app.

## 5.3 Google workspace

DESIRE has created a Google workspace for document repository. If you have a g-mail, the PM may add you as content manager of the drive.

An updated **overview of the folder structure** can be accessed through [this link](#). The structure serves two purposes:

- 1) Give each WP a work space for their own and for sharing (the WP folders)
- 2) Provide workspaces for subjects that have a cross-cutting interest (e.g. DESIRE Territorial sites, 02. DESIRE Deliverables)

You have access to all documents. WP leaders manage the folder concerning their respective WP. If you need an additional folder to be created, please contact the PM.

DESIRE has been created on **principles of transparency and openness**. Therefore we kindly ask you to use the workspace as your project workspace or to upload documents continuously if you prefer to work off-line. This gives all partners and the PM easy access to information about progress.



Naming of folders and documents: We do not intend to set any strict requirements - however, try to be logical and remember that the DESIRE workspace is open for a large consortium and a large group of people.

### 5.3.1 Project templates

Two folders with templates have been created:

- [Template - EU](#)
- [Template - internal](#)

The **internal folder** contains templates to be used for internal documentation, e.g. minutes, agenda, playbook for preparing events and activities, etc.

The **EU folder** contains templates with the EU logo inserted in the footer.

All templates are free to use - however, **PLEASE MAKE A COPY, rename it for your purpose,** and download it or move it to another folder.

Feel free to share your own templates

### 5.3.2 Project calendar

We have created a [DESIRE calendar](#) for project related activities (partner meetings, site visits, local, national and European events, etc.). Please add your own events and activities with relevance to the project - and use the colour coding to create an easy overview of activities.

These are instructions set up by Google for how to access a shared calendar:

#### Help people find shared calendars

To help people find shared calendars, you can send them the calendar ID.

1. Open [Google Calendar](#).
2. Under My calendars, find the shared calendar.
3. Point to the shared calendar and click More (three dots) -> **Settings and sharing**.
4. Scroll down to the Integrate calendar section and copy the Calendar ID.  
It's long.
5. Paste this ID into a document or website that you give to new users.
6. Tell them to take the following actions:
  - Next to Other calendars, click + -> **Subscribe to calendar**.
  - Paste the Calendar ID into the Add a calendar box and press **Enter**.

The calendar then shows up in the user's Other calendars list.

The Calendar ID is this one:

<https://calendar.google.com/calendar/embed?src=aho%40bloxhub.org&ctz=Europe%2FCopenhagen>

Following colour coding has been applied so far:



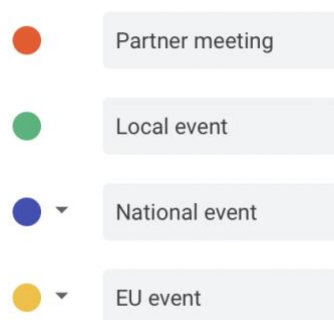


Fig 5.1 Colour coding - the DESIRE calendar

Feel free to add more if you see a need for other categories.

## 5.4 Board(s)

DESIRE use and have licence to following virtual platform(s):

- MIRO ... - this link gives access to a board named DESIRE - feel free to use it for your activities:  
[https://miro.com/welcomeonboard/RGRHb2wzMzYzR3FNNHFRakVkakhtbUpZenHqZmQ4YWM5N2Y1ZWU5dINLM3p6MWdTQnl1VUJBVnYxZjBJZ2FORXwzNDU4NzY0NTM1MTU3Njc5MzEzfDI=?share\\_link\\_id=92774909032](https://miro.com/welcomeonboard/RGRHb2wzMzYzR3FNNHFRakVkakhtbUpZenHqZmQ4YWM5N2Y1ZWU5dINLM3p6MWdTQnl1VUJBVnYxZjBJZ2FORXwzNDU4NzY0NTM1MTU3Njc5MzEzfDI=?share_link_id=92774909032)
- MURAL - use this link to access the DESIRE board in MURAL:  
<https://app.mural.co/invitation/mural/desire1223/1666605354180?sender=u0b869d39528565b0b38a1061&key=d045bbad-0708-49d0-9387-62be6d9048fe>

## 5.5 Project website

The project website can be accessed through [this link](#).

WP5 leader (DTU) is responsible for upload and maintenance. Please contact Hanne Kokkegaard, [hanko@dtu.dk](mailto:hanko@dtu.dk).

## 5.6 Communication platform: Slack

By the end of February 2023, we introduced Slack as an additional internal communication platform. Slack functions well for all short and fast communication needs, updates and sharing of inspirational news or just for answers and comments through a direct messaging function.

Channels are being created continuously according to needs. All channels are open to everyone. You are also free to add channels if you find it relevant.

Please contact Aase, [aho@bloxhub.org](mailto:aho@bloxhub.org), if you want to receive an invitation to the Desire slack platform.

## 5.7 EU logos and guidelines for external communication

All external communication material, both used for oral and written communication, must include an EU logo. The requirements are outlined in the GA, p. 35ff, and further through these links.

- Guideline on **how to use the EU emblem** in contexts of the EU programmes 2021-27:  
[https://commission.europa.eu/system/files/2021-05/eu-emblem-rules\\_en.pdf](https://commission.europa.eu/system/files/2021-05/eu-emblem-rules_en.pdf)



- Site with **guidelines and different links** relevant to those working with EU-communication, prepared by the European Research Executive Agency, including **link to the EU emblem**: [https://rea.ec.europa.eu/communicating-about-your-eu-funded-project\\_en](https://rea.ec.europa.eu/communicating-about-your-eu-funded-project_en)

**REMEMBER!** Use the EU emblem and NOT the European Commission logo!

## 5.8 Sharepoint as data repository across the sites

We have established a special Desire folder at BLOXHUBs sharepoint - it will be in use from September 2023 and onwards. The folder will contain potentially sensitive data from activities unfolding at the different 8 sites and give all staff involved directly in these activities access to information and learnings across the sites. In addition to sites organisations, employees at AAU and POLIMI will have access.

In case, you need to access this folder, please get in contact with the colleagues at POLIMI and/or AAU - access must be given through the coordinator (BLOXHUB) but will be done in coordination with organisations responsible for WP3 and WP4 (AAU and POLIMI).

The Data Management Plan for Desire can be found [through this link](#).

## ANNEX 2 - DESIRE Work Plan (GANTT chart)

