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OPEN ACCESS CONTENTS ON DESIGN FOR EQUALITY, DIVERSITY AND INCLUSION  
FOR HIGHER EDUCATION PROGRAMMES

## D 1.1.1. Project Handbook

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<b>PROJECT HANDBOOK</b>	

# 1. Introduction

EDIDESK is the acronym of the Erasmus+ KA220-HED project ‘*Open Access Contents on Design for Equality, Diversity, and Inclusion for Higher Education Programmes*’. It is a three-year cooperation project between seven institutions working in the Higher Education sector.

The Project Handbook documents the selected approach for implementing the goals of the EDIDESK project. It also highlights the key controlling processes to be used, the project policies and rules, and the overall management approach.

The Project Handbook is an important document since it defines the outputs of the planning (i.e.: it defines the plans necessary for managing the project as well as to what extent they should be customize or/and tailored).

The Project Handbook becomes the basis for managing the project throughout its lifecycle and is an important point of reference for all project members and stakeholders. The Project Handbook is kept up to date throughout the life of the project. During the Closing Phase, the Project Handbook becomes an important point of reference for the Project-End Review Meeting, in order to properly close and archive the entire project.

## 2. Project Overview

### 2.1 Project Objectives

The Bureau of European Design Associations states that the Design industry represents a strategic sector for the economy in the EU, with more than 500,000 designers generating an annual turnover of about 35 billion EUR (over 5.5% of the EU business service sector). Beyond “style”, designers’ work is recognised as paramount to stimulate companies in embracing emerging social issues like inclusivity, which is a key value for the EU’s creative economy. It is also proven that inclusivity is one of the aspects today considered to determine the market success of industrial products, and companies are asked to align their productions in this sense. However, the limited number of inclusive solutions available in the market suggests that much more needs be done. Preparing future designers to address these issues means facilitating the expansion of the EU economy toward sustainability and social inclusion.

Despite evident market requests, only recently the EU’s HE system of Design schools is showing an interest in integrating Equality, Diversity, and Inclusion (EDI) concepts (i.e., Inclusive Design, Design for All, Universal Design, etc.) into UG and PG programmes. However, due to the multifaceted scenario of approaches and cultural advances, the delivery of teaching contents on Design for EDI is still fragmented and not uniformed to an EU framework. Cultural barriers in embracing inclusivity, biased contents delivered to students, and the lack of networking among schools limit the creation of a European culture on Design for EDI. This means that HE institutions working in Design still miss the opportunity to find shared teaching avenues to progress the field as well as to establish a knowledge baseline needed by future designers to tackle emerging market issues. The creation of a shared and open culture on Design for EDI is therefore needed to introduce benefits for the economy in EU because designers with a proven culture in this area will generate higher business, turnover, reputation, and market competitiveness when working with companies, alongside increasing the European cultural attention on people to design for.

The EDIDesK project aims at improving the teaching of Design for EDI into the European's HE system, which in the long run will lead to improve the European economy in terms of readiness to inclusivity and sustainability by accelerating the development of cultural, technical, and digital skills on EDI of students. In relation to the pre-selected priorities, the project's objectives are:

- To map the EU's UG and PG modules delivering EDI-related design topics. This will lead to collect and assess contents, methodologies, and best practices useful to understand promising pedagogical approaches, as well as suitable digital tools to deliver teaching contents and support students when learning.
- Set up a European framework with guidelines for teaching Design for EDI into UG and PG programmes. Generalised frameworks and documents for national action plans will be created, as well as harmonisations of practices for the design of new teaching modules and themed contents on Design for EDI in different fields.
- Develop a set of UG and PG open access modules and themed contents on Design for EDI for different sectors (e.g., product design, service design, etc.). These contents will allow staff working in the HE system to freely adopt standardised materials to innovate teaching practices whilst developing students' digital skills.
- Create an open access digital learning platform to collect and share teaching materials on Design for EDI. An educational platform for teachers and students will collect accessible multi-language teaching contents (e.g., whole modules, case studies, etc.), allowing the upload of new ones by anyone, and will foster the building of networks for teaching and research on Design and EDI.
- Promote peer-collaborations during and beyond the project, as well as developing a community of HEIs working on the Design for EDI wider topic.

## 2.2 Critical Success Factors, Project Management Objectives, and Added Value

This section of the Project Handbook outlines pre-identified critical success factor for the EDIDesK project and aims to briefly show principal potentialities and features that characterize it in terms of themed objectives, quality of the consortium and constraints.

### 2.2.1 Critical Success Factors

Many factors determine the success of a project, therefore effective and efficient management of critical success factors is the basic requirement of a project. Goals setting is in many ways similar to building a pyramid: everything should rest on a solid foundation, though building that foundation from scratch can be very difficult. Critical Success Factors (CSFs) are a list of essential success factors that can be used to focus on the achievement of project goals. CSFs list, along with the strategic plan (see D.1.1.1.), helps to create a solid foundation for goal setting. Overall, the scope to have a clear and shared list of CSFs helps the project partners to make a significant impact on project success in construction, implementation, and result promotion.

CSFs set for the EDIDesK project are synthetically summarised in Table 1 and correlated to themed categories, endogenous and exogenous factors that may determine their successful achievement, as well as specific Work Packages (WPs) when pertinent.

**Table 1 – CSFs for the EDIDesK project.**

CATEGORIES	CRITICAL SUCCESS FACTORS
<b>1. Factors related to human resources</b>	1.1. Team commitment
	1.2. Team experience
	1.3. Definition of a reward system
<b>2. Factors related to the relationship among partners and stakeholders</b>	2.1. Communication ability
	2.2. Influence and involvement of partners
	2.3. Influence and involvement of stakeholders
	2.4. Influence and involvement of targeted beneficiaries
<b>3. Factors related to project management</b>	3.1. Project planning and monitoring
	3.2. Definition of the scope (and compliance with it)
	3.3. Determination of the CSFs
	3.4. Deadline and budget compliance
	3.5. Establishment of goals
	3.6. Determination of preventive and corrective actions (as per RMP)
	3.7. Stakeholder involvement
	3.8. Meetings (kick off, halfway, conclusion, follow up)
	3.9. Project documentation
<b>4. Factors related to technical aspects</b>	4.1. Definition of restrictions
	4.2. Determination of control points
<b>5. Factors related to internal communication (coordination)</b>	5.1. Internal communication
	5.2. Internal resolution of conflicts
	5.3. Support from Scientific Coordinator and Project Manager
	5.4. Project documentation
<b>6. Factors related to external communication (promotion)</b>	6.1. International dimension of activities
	6.2. External promotion and engagement (outreach, dissemination of results)
	6.3. Definition of procedures to mitigate communication barriers
	6.4. Planning of dissemination and promotion events
	6.5. Planning of dissemination outcomes
<b>7. Factors related to external communication (i.e.: promotion)</b>	7.1. Record of lessons learned

### 2.2.2 Additional Project Objectives

This project primarily aims at improving the quality of teaching in Design studies in the EU through open access peer-reviewed digital contents on EDI. The harmonisation of teaching practices is one

of the project's strengths to improve the sharing of existing scientific knowledge, know-how, and pedagogical practices across organisations. New methodologies and digital contents for interdisciplinary research can be produced.

This project will provide partners access to sustainable multidisciplinary knowledge by creating a digital learning context on how to properly teach EDI-related subjects into Design studies. The development of digital skills for staff and students will be promoted by cooperation activities and by results produced. The enrichment of teaching skills and digital competences into participating organisations will set the basis for more comprehensive contents to be delivered to students, alongside creating a better match between market demands, graduates' needs, and organisational answers on specialistic training.

The project creates an integrated cooperation chain aimed at facilitating the partners' knowledge transfer. Partners will therefore have the chance to achieve the following collateral objectives, so that they can develop new competencies in terms of organizational and team learning, organizational maturity, sustainability, and environmental compliance, which are needed to generate consistent evidence to work with the following European priorities of the Erasmus+ Programme:

- Inclusion and diversity in all fields of education, training, youth, and sport (Horizontal Priority).
- Supporting innovation and entrepreneurial skills of students (HE priority).
- Building inclusive higher education systems (HE priority).

The development of sustainable knowledge on Design and EDI will produce three benefits:

- Teaching and learning practices will be aligned to shared standards agreed by a qualified network of organizations.
- Reinforcement of the international cooperation and the circulation of ideas.
- New target groups will benefit of an improved quality of teaching.

### *2.2.3 Added Value at European Level*

This proposal adds high value at European level because the collaboration between partners will enable qualitative progressions in the field of Design and/or EDI that would not be reached by a sole organisation from a single country. Knowledge produced collaboratively will allow to achieve the critical mass required in strategic research on EDI by providing consistent developments in different teaching and learning areas pre-identified in the needs analysis.

Therefore:

- The project will nurture a solid international cooperation and multidisciplinary learning practices by reinforcing the inclusivity of research actions when setting up international visions and targets.
- The project will allow partners to liaise with national institutions when transposing international ideas into Design studies at the national dimensions.
- The outcomes produce will provide opportunities to accelerate the development of professional skills and proactive learning curves needed by students to work with international markets.
- Teaching contents on Design for EDI made using participatory research approaches will have an international breath. Content harmonisation made through joint actions will provide the creation of reference models for future implementations.

## 2.3 Project Stakeholders

Primary, secondary, and tertiary beneficiaries of the EDIDesK project, hereinafter stakeholders, have been identified during the writing stages of the project proposal, and agreed by all partners involved in this cooperation project.

The strategic beneficiaries of this project are HEIs in the EU running UG and PG Design programmes (e.g.: Product Design, Industrial Design, Communication Design, Digital & Interaction Design, etc.), which will benefit of novel open access teaching methodologies and contents created in an inclusive way that propose peer-reviewed knowledge on EDI. However, the multidisciplinary issues raised by teaching EDI-related subjects will produce benefits for other disciplines (e.g.: Engineering, Communication, Architecture). Thus, worldwide HEIs working on Design and/or EDI in their broader sense can benefit from this project.

Overall, the project will promote continuous developments from participating organisations and sustainable collaboration perspectives by acting as a polarity of attraction for stakeholders working on Design and EDI (e.g.: HEIs, NGOs, SMEs, etc.).

Active and passive engagement activities included in WP3 and WP5 have been designed to raise awareness on the project goals and outcomes, as well as to provide first-hand opinions about intermediate and final outcomes that will be produced.

Primary, secondary, and tertiary stakeholders are analysed and discussed in the Table 2 below.

**Table 2 – Stakeholder Assessment Matrix (groups of beneficiaries according to project aims).**

Stakeholder	Impact	Influence on the project	What is important to the stakeholder?	How could the stakeholder contribute to the project?
<b>HEIs (staff)</b>	High (short and long run)	High	<ul style="list-style-type: none"> <li>• Providing high-quality teaching on Design for EDI (experienced staff).</li> <li>• Access to high-quality contents on Design for EDI for inclusion into T&amp;L practices (unexperienced staff).</li> <li>• Producing unbiased contents on Design for EDI.</li> <li>• Networking with experts working in Design for EDI.</li> </ul>	<ul style="list-style-type: none"> <li>• Joining the EDIDesK Platform (outcome of WP4).</li> <li>• Creating new contents for the EDIDesK Platform (offer for new contents, outcome of WP4).</li> <li>• Spreading project values (interaction in WP5).</li> </ul>
<b>HEIs (students)</b>	High (short and long run)	Low-Medium	<ul style="list-style-type: none"> <li>• Getting high-quality teaching contents on Design for EDI.</li> <li>• Access to open access multi-language contents on Design for EDI.</li> <li>• Develop new skills suitable for market competitiveness.</li> </ul>	<ul style="list-style-type: none"> <li>• Stimulating the creation of new contents for the EDIDesK Platform (demand for new contents, outcome of WP4).</li> </ul>
<b>HEIs (institutions)</b>	Medium-High (transition over time according to staff commitment).	Low (covered by HEIs (staff))	<ul style="list-style-type: none"> <li>• Networking.</li> <li>• Reputation.</li> </ul>	<ul style="list-style-type: none"> <li>• Endorsing the EDIDesK Platform (outcome of WP4).</li> <li>• Promoting staff to generate contents for the EDIDesK Platform (outcome of WP4).</li> </ul>



<b>NGOs working in Design fields</b>	Medium-High	Medium	<ul style="list-style-type: none"> <li>• Networking.</li> <li>• Reputation.</li> <li>• Promotion of activities on Design for EDI.</li> <li>• Liaison between HEIs, NGOs, Societal stakeholders.</li> <li>• Fostering actions from the bottom.</li> </ul>	<ul style="list-style-type: none"> <li>• Endorsing the EDIDESK Platform (outcome of WP4).</li> <li>• Spreading project values (interaction in WP5).</li> </ul>
<b>Companies working in Design fields (i.e.: SMEs)</b>	Low (short run). High (long run when trained students bring skills into companies).	Medium	<ul style="list-style-type: none"> <li>• Hire students with proven training on Design for EDI.</li> <li>• Producing and selling new inclusive products.</li> <li>• Increase market competitiveness and reputation.</li> </ul>	<ul style="list-style-type: none"> <li>• Interacting with the EDIDESK Platform to liaise with HEIs (outcome of WP4).</li> </ul>

## 2.4 Project Dependencies or Interrelations

EDIDESK is not directly linked to or dependant by any other project promoted by project partners. it is an autonomous entity that however has the capability to generate in the future new opportunities for collaboration.

Five EU HEIs (UNICH, ASP, STU, ELISAVA, UNIFI) and two NGOs (EIDD, CUMULUS, which are less experienced organisations) will work in this project. Partners have proven research and teaching skills on Design and EDI, such as inclusive product design, social services, inclusive built environments, etc. However, participant organisations have different approaches to it.

The consortium was created on the basis of the organisations' experience to achieve the project aims. Their involvement in strategic partnerships and projects assure relevant administrative and management skills in supporting the project activities. Moreover, the project creates an integrated cooperation chain aimed at working with parallel tasks to facilitate the partners' knowledge transfer between the WPs.

## 2.5 Project Dependencies or Interrelations

Project constraints of the EDIDESK project were identified following a 'triple constraint' matrix (TCS: Time, Cost, Scope) in relation to project aims and expected outcomes. The components of the 'triple constraint' matrix are defined as follow:

- The project time is the amount of time that you have to complete a project (agreed in the submission process of the project proposal).
- Project cost is how much money the consortium can spend to get this thing done (agreed in the submission process of the project proposal).
- The scope of a project outlines what the project is supposed to accomplish and how much work needs to be done (agreed in the submission process of the project proposal).

In addition to the above-mentioned components of the 'triple constraint' matrix, the EDIDESK project – PO, SC, PM, PSC, PCT, PST – will guarantee that:

- The project will operate within the funding and resource allocations approved.
- The project team will deliver the project results with no requirement for additional resources (time and money).

- The staff involved in the project will complete the project within normal working hours.
- The staff involved will cooperate in order to guarantee the best results possible, as per description contained in the Project Management Plan, which have been agreed in the submission process of the project proposal and reviewed by partners.
- Any specific issue that may affect the correct achievement of pre-identified results will be resolved according to decision cycles declared in the Risk Management Plan.

### 3. Project Approach

Projects often vary because some may be straightforward to complete while others may be complex to perform, requiring different methods. This section of the Project Handbook explains the approach used in the EDIDesK project and is considered as a useful reference for its successful conduct.

#### 3.1 Project Lifecycle

The EDIDesK was designed to create an integrated cooperation chain aimed at facilitating the collaboration of partners while working on parallel tasks to facilitate the knowledge transfer between the WPs. Tasks and responsibilities are allocated following partners' skills in research, content creation, development of outputs, and contacts with stakeholders.

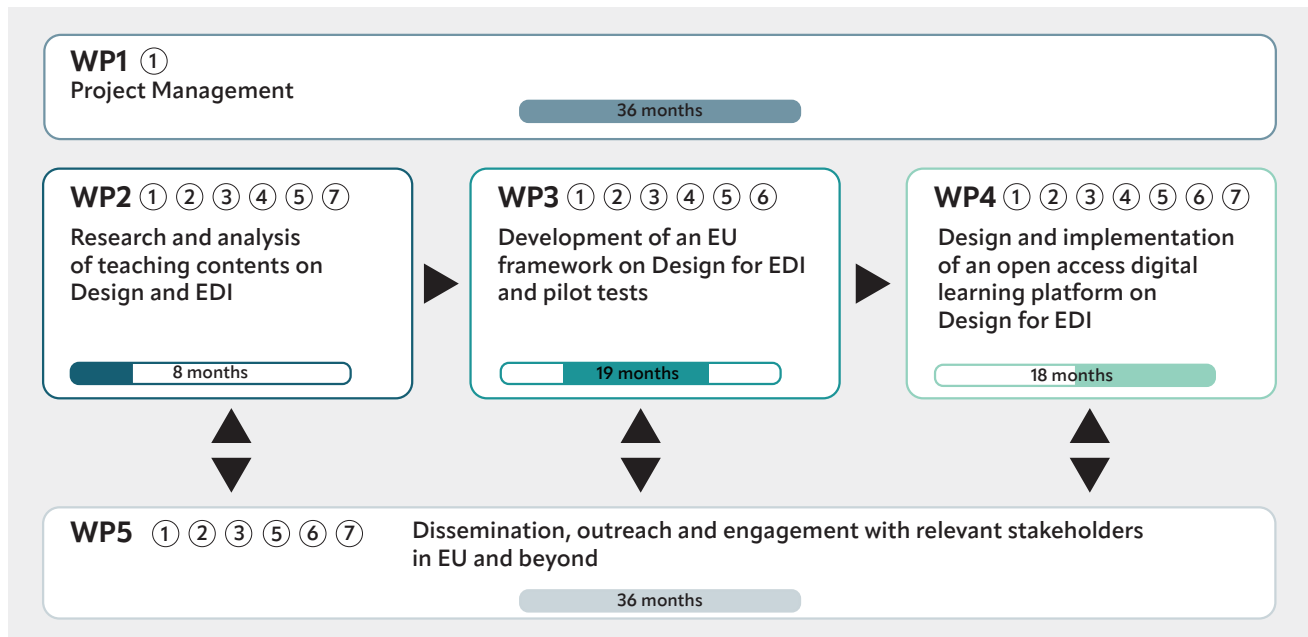
Five WPs describing three operative stages compose this project (Figure 1); partners are assigned to them according to experience and skills needed to achieve the project results.

Stage 1 of the project (WP2) aims at defining, within the context of Design studies in the HE sector, existing practices and tools used to develop contents on Design for EDI, as well as investigations on inclusive teaching models and suitable technologies to create inclusive learning environments. Data produced in Stage 1 will contribute to achieve results planned in Stages 2 and 3 and will feed the activities planned for project communication. Stage 1 lasts 8 months.

Stage 2 of the project (WP3) aims at developing replicable and scalable methodologies for the design of new teaching contents on Design for EDI for different fields. Information for the creation of themed contents, lectures, and seminars for UG and PG modules will be created in an accessible way. Guidelines and methodologies for the design of new inclusive teaching modules will be created and experimentally tested with either UG or PG students at participating organisations to assess the correctness of findings produced, the consistency of the inclusive teaching methodologies, and the activities to run in a studio environment. An EU framework with guidelines and the effective methodologies for the teaching Design for EDI will promote replications and set up an EU reference for the field in the HE system. Data produced in Stage 2 benefits from the ones developed in Stage 1 and will contribute to achieve relevant intermediate results that will also be used to implement the Stages 3, as well as feeding the activities planned for project communication. Overall, Stage 2 lasts 19 months.

Stage 3 of the project (WP4) aims to design and implement a digital learning platform where to upload and share open access multi-language contents on Design for EDI. Strategies to supervise the platform functioning will be created to assure the correctness of contents delivered. The platform will employ the outcomes produced in Stages 1 and 2 to promote inclusivity in the HE system. Data produced in Stage 3 will determine the main result of the EDIDesK project, and consequently its main results as well as feeding the activities planned for project communication. Overall, Stage 3 lasts 18 months.

Alongside the above-described Stages 1, 2, and 3 (equivalent to WP2, WP3, and WP4), the EDIDESK project will contain a set of management and communication actions that last for the entire duration of the project (three years). Therefore, the project management of the project (see WP1) will provide control and guidance to partners in order to achieve the pre-identified project results in terms of quality, deadline, costs, and control. The communication of the project (see WP5) aims at creating and implementing an effective set of communication activities needed to promote the EDIDESK project and all its results in a three-year progression to wider academic and societal communities. It will provide support in communication and outreach with relevant stakeholders, and it is intended complementary to activities schedules for stages 1, 2, and 3 (equivalent to WP2, WP3, and WP4).



**Figure 1 – Project lifecycle.**

### 3.2 Required Project Documentation

To properly control the project so that all expected deliverables and results are achieved, the management of the project has developed the list of required documentation of the project (Table 3).

**Table 3 – Required Project Documentation.**

ID	Artefact	Yes/No	Source or Link / Location	If No, briefly explain the reason	Type
1	Project Handbook (D 1.1.1.) ( <i>this document</i> )	YES	EDIDESK/WP1	–	Public
2	Project Management Plan (D 1.1.2.)	YES	EDIDESK/WP1	–	Public
3	Risk Management Plan (D 1.1.3.)	YES	EDIDESK/WP1	–	Public
4	Deliverables Acceptance Plan (D 1.1.4.)	YES	EDIDESK/WP1	–	Public
6	Project Management Templates	YES	EDIDESK/WP1	–	Limited

5	Dissemination, Outreach, and Engagement Plan (D 5.1.1.)	YES	EDIDesK/WP5	–	Public
7	Communication Templates	YES	EDIDesK/WP5	–	Public
8	Stakeholder Matrix	NO	See Section 2.3. of D 1.1.1.	–	Public

### 3.3 Other Standards

The following standards were considered when defining project approach:

- Commission Decision C(2006) 3602 – Concerning the security of information systems used by the European Commission.
- Decision 2001/844/EC, ECSC, Euratom - amending its internal rules of procedure, Annex: Commission Provisions on Security.

### 3.4 Specific Project Management Rules: Code of Conduct (CoC)

All partners of the EDIDesK project are committed to maintaining a productive, safe, and respectful work environment for all staff and stakeholders involved in the three-year project activities, and the public that will benefit from its results. This section of the Project Handbook outlines basic but fundamental criteria to assure a fair and democratic management of personal and professional issues. Where these standards are not met, disciplinary action may follow.

The Code of Conduct (CoC) for applies to the following, together referred to as ‘project participants’:

1. Project Owner (PO).
2. Scientific Coordinator (SC).
3. Project Manager (PM).
4. Project Steering Committee (PSC).
5. Project Stakeholders.
6. Project Core Team (PCT).
7. Project Support Team (PST).
8. External Advisory Board (EAB).

The principles guiding the EDIDesK project, which are assumed as the minimum criteria for a good conduct (as per CoC’s aims) are the followings:

- **Respect for all:** All project participants are committed to treat all persons involved in the project, regardless his/her role, fairly and objectively; they are also asked to ensure an environment free from discrimination, harassment, and bullying, so that anyone is allowed to express alternative points of view in the full respect of his/her cultural difference.
- **Integrity:** Being open, honest, and transparent.
- **Accountability:** project participants will make decisions and take actions that are within the scope of their authority.
- **Confidentiality:** Project participants may have access to sensitive or confidential information throughout the implementation stages of the project; therefore, it is improper to disclose confidential information, or allow it to be disclosed, unless that disclosure has been authorized by the whole PSC.

- **Complaint procedures:** Project participants are committed to resolving complaints at the earliest opportunity.
- **Conflict of interest:** Project participants must declare interests that conflict either, actual, potential, or perceived, with the project activities, so that the achievement of project results is satisfied in compliance with the Risk Assessment Plan and the Deliverables Acceptance Plan.

### 3.5 Conflict Resolution and Escalations

Conflicts are situations in which one or both parties perceive a threat. They are considered to be critical issues and can be raised by any of the project stakeholders. The Project Management team (SC and PM) should proactively identify, log, and raise such issues for resolution. When required, conflicts are discussed on the bi-monthly Project Follow-up Meetings or, if needed, escalated to the PSC.

Conflict resolution activities are registered in the Issue Log, while conflict resolution decisions can be logged in the Decision Log.

The escalation procedure for this project is as following:

- Only issues/changes/risks with Very Low and Low impact can be approved by the PCT. In this case, the SC and the PM must always be informed, and decisions are registered in the Decision Log;
- Issues/changes/risks with Medium impact are approved by the Managing Level (SC and PM) during the bi-monthly Project Follow-up Meetings;
- Issues/changes/risks with High and very High impact discussed are approved by the PSC;
- When relevant, the PSC has extraordinary meetings for approving remediation actions related to urgent or very urgent issues with considerable impact or size.
- Issues concerning the resolution of conflicts are discussed in the Risk Management. All partners are invited to check the document before taking actions.

## 4. Project Process

Project process corresponds to all management activities adopted by all project participants to properly run the Activities (As) defined in the EDIDESK project that are divided into sub processes. The structure and process defined in this Project Handbook consider the attainment of the project objectives. The components of the project process are listed in the following subsections.

### 4.1 Risk Management

The project risk management process defines the activities to identify, assess, prioritise, manage, and control risks that may affect the execution of the project and the achievement of its objectives. This is a four-step process, as documented in the Risk Management Plan:

- **Risk Identification:** risks are continuously identified throughout the project lifecycle by any project stakeholder and documented in the Risk Log (by any project team member).
- **Risk Assessment:** risks are assessed based on their likelihood of occurrence and the impact in project objectives. The product of their likelihood and impact defines the Risk Level which is then used as a reference for their prioritisation and risk response development. Please see the Risk Management Plan for details.

- **Risk Response Development:** there are four strategies to be considered as risk responses: Avoid, Transfer, Mitigate, or Accept a risk. After the strategy for each risk has been selected, specific actions to implement the strategy will be defined, described, scheduled, and assigned, while a Risk Owner assumes the responsibility for its implementation. These actions are incorporated into the Risk Management Plan.
- **Risk Control:** the bi-monthly Project Follow-up Meetings are used to revise the status of risks and related actions, and to identify new risks. Risks will be revised, but also after the occurrence of any significant event. If any of the identified risks occur, then the SC and the PM will develop a contingency plan and communicate the issue to the PSC.

## 4.2 Issue Management

The project issue management process defines the activities related to identifying, documenting, assessing, prioritizing, assigning, resolving, and controlling issues. It is a four-step process that the SC and the PM execute whenever required throughout the project lifecycle:

- **Issue Identification:** Issues can be identified by any project partner throughout the project lifecycle, using different communication channels such as meetings, emails, and reports. The issues are registered in the Issue Log.
- **Issue Assessment and Action Recommendation:** A first informal assessment considers the category, impact, urgency, and size of the issue, followed by a more detailed analysis to identify the root cause, and recommend a solution. This information is documented in the Issue Log and used as input to the appropriate decision makers (based on the escalation process). The decision is documented in the Decision Log.
- **Actions Implementation:** After issues are evaluated and the remediation actions approved, the SC and the PM will incorporate these actions into the Project Management Plan and update project related documentation such as project plans and logs, if needed.
- **Issue Control:** Bi-monthly Project Follow-up meetings will be performed and used to revise the status of issues and related actions, and to identify new issues. Additionally, the SC and the PM will promptly report the status of the major issues to the PSC.

## 4.3 Requirements Management

The requirements management process comprises the activities related to the specification, evaluation, approval, monitoring, and validation of the project's requirements. This process consists of the following steps:

- **Approve Requirements:** The SC negotiates and agrees the requirements that will be realized during the project with the relevant stakeholders. The approved requirements become the baseline of the project scope.
- **Monitor Requirements Implementation:** The SC continuously monitors the implementation of the requirements by the PCT, besides the discovery of new requirements or changes to existing requirements.
- **Validate Implemented Requirements:** When the requirements are implemented, and the result is validated in order to assess if the initial target is satisfied. Formal acceptance of the project deliverables must comply with the Deliverables Acceptance Plan.

## 4.4 Project Change Management

The project change management process defines the activities related to identifying, documenting, assessing, approving, prioritising, planning, and controlling changes, and communicating them to all relevant stakeholders if relevant. It is a five-step process that the SC and the PM execute whenever required throughout the project lifecycle:

- **Change Identification:** a request for a change can be submitted formally or can be identified and raised during follow up meetings as a result of decisions, issues, or risks. A Change Log must be produced and should contain the information needed to identify the change, such as the requestor, a short description, identification date, etc.
- **Change Assessment and Action Recommendation:** the size and impact of the change on the project objectives is assessed, where after a recommended action will be documented by the PM in the Change Log., This information is then used as an input to the formal change approval by the appropriate decision makers.
- **Change Approval:** the approval of a project change will follow the defined escalation process for this project. For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Follow-up Meetings. Other changes (having a size L or XL) are approved by the PSC. The details are documented in the Change Log.
- **Change Implementation:** the activities related to the implementation of approved changes will be documented in the Project Management Plan.
- **Change Control:** new or open changes will be identified/reassessed during the Project Follow-up Meetings and both the SC and the PM will then update the Change Log with the results of the analysis/review. For the Medium, High and Very High size changes, they will report on a bi-monthly basis their status to the PSC.

## 4.5 Quality Management

The project quality management process comprises all activities (related both to processes and deliverables) that will increase the ability to meet the expected pre-identified project results. The process is comprised of five steps:

- **Define Quality Characteristics:** identify the objectives, requirements, activities, and responsibilities of the project's quality management process and how it will be implemented throughout the project. Quality management activities will be added to the Deliverables Acceptance Plan. The Deliverables Acceptance Plan is created during the Planning phase.
- **Perform Quality Assurance:** the quality assurance activities will be performed by evaluating the design of project controls, by confirming that they are implemented, and by assessing their operational effectiveness. These activities will consider the project quality objectives along with the project risks. Quality assurance activities will be performed by the project organization (PSC and PCT).
- **Perform Quality Control:** A review criteria discussed in the Deliverables Acceptance Plan will be used by the SC for evaluating the quality control activities and to validate compliance with the plans in terms of scope, time, cost, quality, communication, and risks. Additionally, the SC and the PM will summarize and document the quality of findings according to the Deliverables Acceptance Plan.
- **Perform Deliverables Acceptance:** The Deliverables Acceptance Plan supports the monitoring of the status of all activities that are pre-condition to the delivery of project outputs

to the PO and their formal acceptance. Project deliverables are accepted if the acceptance activities are successfully performed and within the pre-specified tolerances. The project deliverables may be conditionally accepted even with a set of known issues, provided that these are documented and that there is a plan for addressing them.

- **Perform Final Acceptance:** the SC and the PM will report on project performance in the Project-End Review Meeting and develop the Project-End Report. The project documentation and records will be updated, reviewed, and archived.

#### 4.6 Communication Management

The communications management process determines how to communicate most efficiently and effectively to the various project partners. It defines and documents the communication items content, format, frequency, the audience, and expected results. It also defines how to communicate project status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations, and influence in the project.

The following project meetings will be organised:

Meeting	Chair	Frequency
Kick-off Meeting	SC	Once
Follow-up Meetings with the PSC	SC and PM	Bimonthly
External Advisory Board (EAB) Meetings	SC	Three times per year
Halfway Meeting	SC and UNIFI	Once
First Hybrid Conference	ASP	Once
Second Hybrid Conference	STU	Once
Workshop with Academics	CUMULUS	Once
Final Conference (Project-End Meeting)	SC	Once

The following project reports will be delivered:

Report	Responsible	Frequency
Halfway Status Report	SC and PM (with PSC and PCT)	Once (Month 18)
Follow-up Reports	SC	After Bi-monthly Follow-up Meetings
EAB Reports	SC	After EAB Meetings
Project-End Report	SC and PM (with PSC and PCT)	Once (Month 36)

#### 4.7 Deliverables Acceptance Management

The quality management process comprises the activities related to deliverables acceptance, in order to increase the ability to meet the acceptance criteria. This process consists of three steps:



- **Define Acceptance Criteria:** define the acceptance criteria for each one of the project deliverables. This information is derived from project objectives, approach, deliverables, and resources available (as defined in the Project Handbook, Project Management Plan, and other relevant plans).
- **Perform Acceptance Activities:** verify if the deliverables comply with the acceptance criteria. The deliverables acceptance activities are detailed and scheduled in the Project Management Plan and the Deliverables Acceptance Plan.
- **Perform Deliverables Acceptance (provisional/final):** obtain formal approval from the SC (as a representative of the PO) for each project deliverable. The provisional/final acceptance should be documented in the Deliverables Acceptance Note. Project deliverables are accepted if the acceptance activities (as described in this plan) are successfully performed and within the pre-specified metrics. The rejection of deliverables will follow the project issue management process. After the resolution of the issues, deliverables are re-tested and submitted again for approval.

## 5. Project Roles and Responsibilities

### 5.1 Consolidated Responsibilities Assignment Matrix (RASCI)

Planning	UNICH	ASP	STU	ELISAVA	UNIFI	EIDD	CUMULUS
Planning Kick-off Meeting	R	I	I	I	I	I	I
Project Handbook	R	C	C	C	C	C	C
Project Management Plan	R	C	C	C	C	C	C
Deliverables Acceptance Plan	R	C	C	C	C	C	C
Management Plans	UNICH	ASP	STU	ELISAVA	UNIFI	EIDD	CUMULUS
Risk Management Plan	R	C	C	C	C	C	C
Dissemination, Outreach, and Engagement Plan	C	C	C	C	R	C	C
Executing	UNICH	ASP	STU	ELISAVA	UNIFI	EIDD	CUMULUS
Executing Kick-off Meeting	R	I	I	I	I	I	I
Project Coordination	R	A/S	A/S	A/S	A/S	A/S	A/S
Quality Assurance	R	A/S	A/S	A/S	A/S	A/S	A/S
Project Reporting	R	A/S	A/S	A/S	A/S	A/S	A/S
Communication	I/S	I/S	I/S	I/S	R	I/S	I/S
Executing Halfway Meeting	I/S	I/S	I/S	I/S	R	I/S	I/S
Executing First Hybrid Conference	I/S	R	I/S	I/S	I/S	I/S	I/S
Executing Second Hybrid Conference	I/S	I/S	R	I/S	I/S	I/S	I/S
Executing Workshop with Academics	I/S	I/S	I/S	I/S	I/S	I/S	R
Executing Final Project Conference	R	I/S	I/S	I/S	I/S	I/S	I/S
Halfway Report	R	I/S	I/S	I/S	I/S	I/S	I/S
WPs (Coordination)	UNICH	ASP	STU	ELISAVA	UNIFI	EIDD	CUMULUS

WP1	R	A	A	A	A	A	A
WP2	I	R	I	I	R	I	I
WP3	I	R	R	I	I	I	I
WP4	R	I	I	R	I	I	I
WP5	I	I	R	I	R	I	I
<b>Monitor &amp; Control</b>	<b>UNICH</b>	<b>ASP</b>	<b>STU</b>	<b>ELISAVA</b>	<b>UNIFI</b>	<b>EIDD</b>	<b>CUMULUS</b>
Monitor Project Performance	R	A/C	A/C	A/C	A/C	A/C	A/C
Control Schedule	R	I/C	I/C	I/C	I/C	I/C	I/C
Control Cost	R	A/C	A/C	A/C	A/C	A/C	A/C
Manage Requirements	R	I/C	I/C	I/C	I/C	I/C	I/C
Manage Project Changes	R	A/S	A/S	A/S	A/S	A/S	A/S
Manage Risks	R	A/S	A/S	A/S	A/S	A/S	A/S
Manage Issues & Decisions	R	A/S	A/S	A/S	A/S	A/S	A/S
Manage Quality	R	A/S	A/S	A/S	A/S	A/S	A/S
Manage Deliverables Acceptance	R	A/S	A/S	A/S	A/S	A/S	A/S
<b>Closing</b>	<b>UNICH</b>	<b>ASP</b>	<b>STU</b>	<b>ELISAVA</b>	<b>UNIFI</b>	<b>EIDD</b>	<b>CUMULUS</b>
Project-End Review Meeting	R	A/C	A/C	A/C	A/C	A/C	A/C
Project-End Report	R	A/C	A/C	A/C	A/C	A/C	A/C
Administrative Closure	R	I	I	I	I	I	I

## 5.2 Description of Roles and Responsibilities

In the following sections, the roles of major players in the EDIDesK project are described alongside with the responsibilities, expectations, rights, and duties of each participant.

### 5.2.1 Scientific Coordinator (SC)

<b>Description</b>
He is the key project decision maker and accountable for project success. He regularly liaises with the PO.
<b>Responsibilities</b>
<ul style="list-style-type: none"> <li>• Acts as the project champion promoting the success of the project.</li> <li>• Chairs the PSC.</li> <li>• Provides leadership and strategic direction to the PM and the PSC.</li> <li>• Sets the project objectives and results.</li> <li>• Owns the project risks and assures proper project outcomes are in-line with business objectives and priorities.</li> <li>• Mobilises the necessary resources for the project in accordance with the budget.</li> <li>• Monitors project progress regularly.</li> <li>• With the PM, coordinates resolution of issues and conflicts.</li> <li>• Ensures that the project outcome meets the business expectations.</li> <li>• Drives project change and monitors proper evolution and change implementation.</li> <li>• Approves and signs-off all key management milestone artefacts (Project Handbook, Project Management Plan, etc.).</li> </ul>

### 5.2.2 Project Manager (PM)

Description
Support the work of the SC to manage the project on a daily basis and is co-responsible for the qualitative product delivery within the imposed constraints.
Responsibilities
<ul style="list-style-type: none"> <li>• Seats in the PSC.</li> <li>• Works co-executes the project plans as approved by SC and the PSC.</li> <li>• Daily co-supervises the PCT activities, making optimal use of the allocated resources.</li> <li>• Works with the SC to ensures that project objectives are achieved within the quality, time, and cost objectives, taking preventive or corrective measures where necessary.</li> <li>• Is co-responsible for the creation of all management artefacts and proposes them for approval to the SC or the PSC.</li> <li>• Performs risk management for project related risks (as per Risk Management Plan).</li> <li>• Escalates unresolvable project issues to the SC and the PSC.</li> <li>• Liaises between the Directing and Performing Layers of the project.</li> </ul>

### 5.2.3 Project Steering Committee (PSC)

Description
<p>The permanent members of the committee are:</p> <ul style="list-style-type: none"> <li>• SC (as a representative of the PO), who chairs the committee, is the key-decision maker and accountable for the success of the project.</li> <li>• PM, who is responsible for the entire projects and its deliverables.</li> <li>• Partner Coordinators.</li> </ul> <p>The optional members of the committee are:</p> <ul style="list-style-type: none"> <li>• EAB Members that can be involved in relevant decisions.</li> </ul>
Responsibilities
<ul style="list-style-type: none"> <li>• Champions the project and raises awareness at senior level.</li> <li>• Guides and promotes the successful execution of the project at a strategic level, keeping the project focused towards its objectives.</li> <li>• Ensures adherence to organisation policies and directions.</li> <li>• Provides high level monitoring and control of the project.</li> <li>• Authorises plan deviations, scope changes with high project impact and decides on recommendations.</li> <li>• Arbitrates on conflicts and negotiates solutions to escalated issues.</li> <li>• Drives and manages change in the organisation caused by the project.</li> <li>• Approves and signs-off the management artefacts regarding quality, delivery and closing.</li> </ul>

### 5.2.4 Project Core Team (PCT)

Description
Consists of the specialist roles responsible for the creation of the project deliverables. The composition and structure of the PCT depends on the size and type of the project. It is defined by the WP Leader, the WP Deputy Leader, and all staff involved in the implementation activities of a specific WP and/or A.

### Responsibilities

Under the coordination of the WP Leader and the WP Deputy Leader, whose report to the PSC, the PCT:

- Contributes to the elaboration of the project scope and the planning of the project activities.
- Performs the project activities according to the project work plan and schedule.
- Produces project deliverables.
- Provides information to the SC and the PM regarding the progress of activities.
- Participates in project meetings as needed and contributes to the resolution of issues.
- Participates in the Project-End Meeting to derive and document useful lessons learned for the organisation.

### 5.2.5 Project Support Team (PCT)

#### Description

Consists of the roles responsible for providing support to the project. The composition and structure of the PST is generally defined by administrative and technical staff, also recruited ad hoc to carry out specific tasks to support the work of the SC, the PM, the PSC, and the PCT.

#### Responsibilities

- Provides administrative support to the project.
- (If/when needed) Defines requirements for reporting and communications.
- (If/when needed) Administers the PSC meetings and produces consolidated reports.
- Supports the SC, the PM, the PSC, and the PCT, in planning, monitoring and controlling the project.
- Advises on project management tools and administrative services.
- Administers the project documentation (versioning, archiving, etc.).

### 5.2.6 Project Stakeholders

#### Description

Project stakeholders are people (or groups) who can affect or can be affected by both the activities performed during the life of a project, or/and by the project's output(s) and outcome(s). Stakeholders can be directly involved in a project's work, or can be members of other internal organisations, or even be external to the performing organisation.

#### Responsibilities

- Provide feedback to SC, PM, PSC, and PCT about possible successful lines for future project implementation (e.g.: via direct and indirect communication from an event).

## Appendix 1: Acronyms Used for Project Partners

EDIDesK uses the following acronyms to identify the project partners:

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**UNICH** (Italy) stands for UNIVERSITÀ DEGLI STUDI “GABRIELE D’ANNUNZIO” DI CHIETI-PESCARA or “GABRIELE D’ANNUNZIO” UNIVERSITY OF CHIETI-PESCARA.

**ASP** (Poland) stands for AKADEMIA SZTUK PIĘKNYCH W KATOWICACH or ACADEMY OF FINE ARTS AND DESIGN IN KATOWICE.

**STU** (Slovakia) stands for SLOVENSKA TECHNICKA UNIVERZITA V BRATISLAVE or SLOVAK UNIVERSITY OF TECHNOLOGY IN BRATISLAVA.

**ELISAVA** (Spain) stands for FUNDACIO PRIVADA ELISAVA ESCOLA UNIVERSITARIA or ELISAVA BARCELONA SCHOOL OF DESIGN AND ENGINEERING.

**UNIFI** (Italy) stands for UNIVERSITÀ DEGLI STUDI DI FIRENZE or UNIVERSITY OF FLORENCE.

**EIDD** (Austria) stands for EIDD – DESIGN FOR ALL EUROPE.

**CUMULUS** (Finland) stands for CUMULUS ASSOCIATION RY or CUMULUS ASSOCIATION

## Appendix 2: References and Related Documents

ID	Document / Artefact	Source or Link / Location	Type
1	Project Handbook (D 1.1.1.) ( <i>this document</i> )	EDIDesK/WP1	Public
2	Project Management Plan (D 1.1.2.)	EDIDesK/WP1	Public
3	Risk Management Plan (D 1.1.3.)	EDIDesK/WP1	Public
4	Deliverables Acceptance Plan (D 1.1.4.)	EDIDesK/WP1	Public
6	Project Management Templates	EDIDesK/WP1	Limited
5	Dissemination, Outreach, and Engagement Plan (D 5.1.1.)	EDIDesK/WP5	Public
7	Communication Templates	EDIDesK/WP5	Limited