COBALT

deliverable (D5.1)

Deliverable title: Standard Operating Procedures

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ACKNOWLEDGEMENT & DISCLAIMER

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COBALT Project partners

Vienna University of Economics and Business, Institute for Managing Sustainability (Coordinator),
Vienna, Austria

Ecologic Institut gemeinnützige GmbH,
Berlin, Germany

BIO Intelligence Service,
Paris, France

Luleå University of Technology, Department of Civil, Environmental and Natural Resources Engineering,
Luleå, Sweden

TECNOMA SA, TYPSA Group
Madrid, Spain

National Association for Consumers' Protection and Promotion of Programs and Strategies,
Bucharest, Romania

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LIST OF ABBREVIATIONS

AB	Advisory Board
CA	Consortium Agreement
EC	European Commission
EIP	European Innovation Partnership
GA	Grant Agreement
M10	Project month 10
SOP	Standard Operating Procedures
WP	Work Package
WPO	Work Package Outline

1. Purpose of the deliverable: Standard Operating Procedures (SOP)

This deliverable (Standard Operating Procedures – SOP; deliverable 5.10, see page 20 Annex I Part A to the GA) depicts general procedures on the organisation of the work between the consortium partners. More specifically, it comprises:

1. **Project management organisation**;
2. **Project management procedures**;
3. **Procedures for issuing project documentation**
4. **Guidance tool for event organisation.**

In general, it is largely based upon issues outlined in the consortium agreement and in Annex I to the Grant Agreement. However, procedures on project implementation and management organisation outlined in those documents are rather general in nature. Thus, the SOP goes beyond these issues by outlining a more detailed approach on project management and implementation tailored to the project's activities (e.g. events and project publications).

2. Project management organisation: roles and responsibilities of consortium members

In the following paragraphs, the different roles and responsibilities within the COBALT project are outlined.

The **project coordinator** is (a) responsible for substantive and administrative aspects of the project; (b) responsible for managing and co-ordinating COBALT and chairs all project meetings, and (c) organises the kick-off meeting and the meetings of Advisory Board together with EIP representatives (M10, M21), and chairs the 2 additional project progress meetings (M10, M21). In addition, the project coordinator will organise regular monthly telephone conferences of the WP leaders.

With regard to project administration tasks, Andreas Endl and Gerald Berger (Institute for Managing Sustainability, Vienna, Austria) will serve as the Project Managers, and will be responsible for overall project coordination and day-to-day project management (including financial tasks).

The project coordinator will also collect all audits, reports and other information from the WP leaders and other partners and will ensure that the partners fulfil their legal and contractual obligations towards the Commission and the other project partners. The project coordinator

can refuse to accept documents and receipts if they do not (i) meet the legal requirements of the Commission, or (i) fulfil with the foreseen quality standards, or (i) correspond to the contract or to general decisions made by the project coordination group (see entry below on its responsibilities).

The main activities and responsibilities undertaken by the project coordinator comprise

- Communication and cooperation with the **EC** (for all partners);
- **Administrative and final quality control** of deliverables, milestones and reports & timely submission of deliverables (WP implementation);
- **General support and assistance** to project partners (when fulfilling their tasks)
- **Timely completion** of financial/budgetary/time management and contract matters;
- **Timely submission** of periodic reports (M 18, M 24), cost statements, etc;
- **Co-ordinate the integration of COBALT** with the Advisory Board, and EIP representatives in addition to other relevant authorities, stakeholders and the general public

The **project coordination group** is responsible for the general substantive management of the project in general, and its work packages in particular. The group is chaired by the project coordinator and consists of the work package leaders. In close collaboration with the project coordinator, the group is also responsible for the overall supervision of the substantive content of all activities carried out by the project partners. Work of and progress on the project will be analysed at monthly or ad hoc telephone conferences.

COBALT will be implemented by a consortium of 6 partner organizations (WU Wien, Ecologic Institute, BIO Intelligence Service, Luleå University of Technology, A.N.P.C.P.P.S. Romania, TECNOMA SA). Each partner organization (independent from the number persons involved or workload in the project) is represented in the **consortium committee** by one Consortium Member and carries all responsibilities stipulated in the Consortium Agreement (see CA attachment 2 on page 24). The whole Consortium is responsible for the implementation of the project towards the Commission. The project team of COBALT consists of all teams of experts nominated within each partner organization.

The consortium committee consists of all participants in the consortium. It has the highest authority in the project (it can propose modifications regarding the project plans and budget allocation among participants and tasks to the Commission, decide on documentation standards, quality control and acceptance procedures). This committee will come together at 3 Project Meetings (including the Kick-off meeting) and the plan of work for the following period will be updated accordingly.

Each work package has a leader who will be the main person responsible for completion of the tasks and deliverables. The **work package leader** will co-ordinate the tasks and activities of the work packages and will assemble the results of the different tasks to send them to the Project Coordinator. The work package leader will report to the Project Coordinator giving a brief summary of the overall activities within the work package on a regular basis upon

request. In cases where task leaders have been assigned, they may fill in for the work package leader if he/she cannot attend the project meeting.

- Responsible for coordinating all partners and workload in the respective work package;
- Responsible for coordination and completion of tasks, milestones and deliverables (incl. quality control, signalling delays, etc);
- Regular updates to the project coordinator about status and progress of work in the respective work package;
- Taking part in project's monthly teleconferences.

Regional partners (A.N.P.C.P.P.S. Romania, TECNOMA SA) are responsible for all tasks related to the organisation of the respective regional dialogues. This comprise inter alia:

- Organizational support for one regional dialogue
- Subcontracting budget for venue, catering, etc
- Invitation and liaison with policy-makers, regional authorities, companies, researchers, etc, from their region
- Communication and reporting directly to work package 2 leader (BIO IS)

3. Project management procedures

The consortium partners have signed a **Consortium Agreement** before substantial work on the project started. The Agreement clarifies all financial, administrative, knowledge management, and any other issues that may arise in the project. It will be updated to reflect any arising concerns, under the supervision of the Project Coordination Group.

Decisions related to work packages will be taken by the work package leaders in conjunction with the partners involved in the implementation of the respective work package. The work package leaders will inform the Project Coordinator prior to and after the decision making to ensure that Work package -related decisions are always in accordance with the overall work plan.

The final responsibility for decisions concerning the project management and operational implementation lies within the competence of the Project Coordinator. Issues related to daily progress are decided by the Project Coordinator and all partners will be informed accordingly by e-mail, fax or phone, if necessary. Major issues are dealt with in Consortium Committee meetings.

3.1. Work package coordination and implementation procedures

Work package outlines (WPO; based on pre-kick-off work package outline discussed at the COBALT kick-off meeting in May 2013; also see kick-off meeting minutes) as written documents are to be prepared by the individual work package leader and act as a general planning tool for the collaboration among project partners and their involvement in their respective work package. In particular, the WPO will help other consortium partners' involvement in the respective work package and will provide an overview about future tasks

and deliverables. The implementation and update of the corresponding document is the main responsibility of the work package leader.

The WPO will comprise the following elements (a template is provided by the project coordinator):

- **Tasks and consequent sub-tasks** delineated from the content of the corresponding work package as described in the Annex I to the GA, the potential consortium partners involved (if not otherwise outlined in the Annex I to the GA), incl. deadline for the task;
- A short **overview on milestones and deliverables** (incl. deadlines);
- **Involvement of the consortium partners** in the work package;
- **Regularly updates** on existing tasks and activities in the context of the monthly telephone conferences, and adding new ones whenever necessary and in accordance with the Annex I to the GA

3.2. Drafting official project deliverables

The COBALT project consortium will produce numerous deliverables (e.g. ranging from thematic to conference reports; for a list of chronologically ordered deliverables see Annex I). Each deliverable will be coordinated by the work package leader and elaborated by all partners involved in the respective work package. Decisions related to the distribution of effort of the deliverables will be determined at the Project Coordination meetings (i.e. monthly tele-conferences and project meetings). Final drafts for deliverables are requested by the project coordinator 2 weeks before the official deadline to allow sufficient time for quality check and final amendments. In case a deliverable will be delayed, the responsible work package leader will notify the Project Coordinator also 4 weeks prior to the deadline of the respective deliverable.

3.3. Drafting periodic reports

The project coordinator will be responsible for coordinating the task of writing the periodic reports. This includes two periodic reports, covering all the work, objectives, results and conclusions for months 1-18 and 19-24 of the project, respectively. In particular, the reports cover i) an overview, including a publishable summary of the progress of work, ii) differences between the work expected to be carried out in accordance with the project's time schedule and that actually carried out, and iii) a Financial Statement (Form C – Annex VI to the Grant Agreement) from each beneficiary and each third party, if applicable, together with a summary financial report. In order to keep a strict deadline and the fact that the second project period is only 6 months, the First Periodic Report will be submitted at the end of month 18 in the project. Thus we will strive not to use the granted 60 days after the end of the reporting period for the submission.

In order to support the drafting of the first periodic report, the project coordinator will organise and "internal mid-term review" in month 12 of the project's running time as agreed in the Consortium Agreement (see page 9). This internal review will require inputs on used person months from each party, including short explanations on deviations, if any. The reason for this internal mid-term review is to provide an overview on used personnel and financial resources in the project (according to the tasks outlined in the Annex I to the GA) at mid-term level and to plan the necessary resources for the second half of the project's running time. This is

necessary because the First Periodic Report to the Commission is due in month 18, only 6 months before the end of the project's running time.

3.4. Quality control

The quality and formal standards outlined in this deliverable provide a common understanding for all consortium partners involved and will serve as guidelines to all the internal staff and external experts involved. In general, quality control is guaranteed by the respective work package leaders and by the Project coordinator being the last step in quality control.

Common monitoring and quality control mechanisms of projects (e.g. task-lists and time-tables, control of time allocation, budget and milestones) will be applied within the work packages as management tools of the respective work package leader. The work package leader will be responsible for quality control of all tasks/activities and deliverables and achievement of all milestones of their respective work package. More specifically, the so-called Work package outline document (also see "Work package coordination and implementation procedures") will act as a mechanism of coordination and quality control, in particular.

4. Procedures for issuing project documentation

The following paragraphs depict a common set of procedures and rules for issuing project documentation. This comprises a list of different publications which are listed below

   a) internal project documents (i.e. internal project management documents, work package outlines, minutes and agendas for meetings),

   b) official project deliverables (see also page 2 Annex I Part A to the GA), and

   c) official project dissemination publications (i.e. policy fact sheets, press releases etc.).

For more detailed information on the access rights, foreground or dissemination of publications please refer to the consortium agreement (see page 12) and Article II.30.3 of the GA.

4.1. Duties and responsibilities

The responsibility for issuing project publications lies with the respective work package leader, if not stated otherwise. This includes the organisation of the overall process, validating the contribution of other consortium partners and final the quality control. In general, the individual work package leaders are responsible for quality control of the respective publication, whereas the project coordinator accounts for final quality control. In the case of policy fact sheets and press releases (in the context of WP4), the main responsibility for elaborating these publications lies with ANPC Romania and not the work package leader. However, the publications will be coordinated, in terms of content, with the respective work package leaders to which the respective publication is linked (WP1, WP2, WP3) and the project coordinator (i.e. final quality control).

Table 1: List of project publications[1]

(a) Internal project documents	Responsible partner	WP and task	Delivery date
Tele-conference agenda and minutes	WU Wien	WP5, task 5.1	One week before and after the event
Project kick off and progress meetings agenda and minutes	WU Wien	WP5, task 5.1	two weeks before and after the event
First Periodic Report	WU Wien	WP5, task 5.1	M18 (October 2014)
Second/Final Periodic Report	WU Wien	WP5, task 5.1	Within 60 days after the projects' official end - M24 (April 2015)
Work package outline	Work package leader	Respective WP	*continuous*
(b) Official project deliverables	**Responsible partner**	**WP and task**	**Delivery date**
D1.1 Tentative list of relevant conference topics, target groups/participants and speakers	Ecologic	WP1, task 1.1	M4 (August 2013)
D5.1 Standard Operating Procedures	WU Wien	WP5, task 5.1	M5 (September 2013) / *M4 (August 2013)*
D4.1 Website (platform)	WU Wien	WP4, task 4.1	M5 (September 2013) / *M4 (August 2013)*
D3.1 Preliminary report on available courses and existing skill shortages	LTU	WP3, task 3.1	M7 (November 2013)
D1.2 Opening conference report on "Setting the scene"	Ecologic	WP1, task 1.2	M9 (January 2014)
D2.1 Adaptation Report on EU Civil Society–Industry Dialogues	BIO IS	WP2, task 2.1	M15 (July 2014)
D3.2 Draft course syllabi for university education and blueprints for industry training courses and courses for geological surveys	LTU	WP3, task 3.2	M15 (July 2014)
D2.2 Regional Civil Society-Industry Dialogue Report	BIO IS	WP2, task 2.2	M21 (January 2015)
D2.3 Synthesis Report on Dialogue Insights	BIO IS	WP2, task 2.3	M22 (February 2015)
D3.3 Final report on skill shortages and means of addressing them (including pilot tested)	LTU	WP3, task 3.3	M23 (March 2015)

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[1] Dates in italic refer to dates initially included the GA Annex I part A to the GA.

D4.2 Draft COBALT declaration as input into the closing conference	Ecologic	WP4, task 4.3	M23 (March 2015)
D1.3 Closing conference report on "Findings, partnerships and networks"	Ecologic	WP1, task 1.3	M24 (April 2015)
D4.3 COBALT declaration from the closing conference	Ecologic	WP4, task 4.3	M24 (April 2015)
D4.4 Network report	BIO IS	WP2, task 2.3	M24 (April 2015)
(c) Official project dissemination publications	**Responsible partner**	**WP and task**	**Delivery date**
Opening conference policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
Opening conference press release	ANPC Romania	WP4, task 4.3	One week after the event
1st EU Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
2nd EU Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
3rd EU Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
1st EU Dialogue policy press release	ANPC Romania	WP4, task 4.3	One week after the event
2nd EU Dialogue policy press release	ANPC Romania	WP4, task 4.3	One week after the event
3rd EU Dialogue policy press release	ANPC Romania	WP4, task 4.3	One week after the event
1st Regional Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
2nd Regional Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
3rd Regional Dialogue policy fact sheet	ANPC Romania	WP4, task 4.3	Two weeks after the event
1st Regional Dialogue press release	ANPC Romania	WP4, task 4.3	One week after the event
2nd Regional Dialogue press release	ANPC Romania	WP4, task 4.3	One week after the event
3rd Regional Dialogue press release	ANPC Romania	WP4, task 4.3	One week after the event
Final project policy brief (see page 54 Annex I to the GA)	WU Wien	WP4, task 4.3	M24 (April 2015)
Electronic newsletters	WU Wien and Ecologic	WP4, task 4.3	Every six months

4.2. Publication rules

In case academic or non-academic publications (i.e. not foreseen within the projects work) are issued by any of the consortium partners, the consortium partners agreed on the publication rules mentioned below. All publications shall include the following statement to indicate that said foreground was generated with the assistance of financial support from the Community:

"*This work is related to the project COBALT. The research leading to these results is associated with the Community's Seventh Framework Programme (FP7/2007-2013) under grant agreement n° 603509 (COBALT, www.cobalt-fp7.eu/).*"

The acknowledgement may be reduced to the following keywords on slides, transparencies, power-point or similar presentations:

"*Worked out/associated within the COBALT project (www.cobalt-fp7.eu/)*"

"*related to a project funded by the EC, FP 7, Contract No. 603509*"

4.3. General format and layout for relevant project documents

A general format for all project publications, official project deliverables in particular, will be provided by the project coordinator as a template MS word file - "CO-51-DocumentationTemplate-v01-WU" - (i.e. headline formats, front page, etc.). However, in some cases the layout, focus and style of writing and referencing of the respective publications needs to deviate from the abovementioned rules of publishing. In this particular case (e.g. policy fact sheets and press releases) the respective work package leader will apply a format and writing style that is more appropriate and tailored to various target audiences (e.g. for stakeholders from the civil society, policy and the business sector). A respective format/template for the policy fact sheets and press releases will be developed and used throughout the project's running time.

4.4. File notation

The preparation of internal electronic project documents (i.e. event agenda, minutes of meetings event reports etc.), which are subject to further elaboration by feedback from other consortium partners should be in line with the notation mentioned below. This will help to circulate documents within the consortium and avoid confusion about activities different draft versions.

CODE	[Project code/name]-	[Work package number] [Task number]	[Short name indicating the content of the file]-	[draft version of the document; numbering only to be changed by the institution responsible for the drafting process]-	[Document producer /feedback /alteration]
Example:	CO-	51-	KickoffMinutes-	v01-	WU

4.5. Logo use

The COBALT logo should be issued on all project relevant publications (e.g. project management documents such as minutes or agendas; official project deliverables; and project dissemination material and publications such as policy fact sheets, press releases or event reports). The project consortium issues the use of the following COBALT logo variations for official promotion of the project:

Variant 1 (file name: cobalt_logo_RGB300.jpg):

Variant 2 (file name: cobalt_logo_claim_RGB300.jpg):

Variant 3 (cobalt logo corpus only):

Colour codes used for the COBALT logo are preferable to be used for colour illustrations related to project relevant publications (i.e. graphs, figures, pictures, tables etc.). The colour codes listed below are already incorporated into MS word template for the cobalt publications.

Table 2: RGB colour space

Colour	RGB colour space
COBALT blue	R: 47, G: 42, B: 113
Logo colour 1	R: 116, G: 142, B: 190
Logo colour 2	R: 161, G: 177, B: 214
Logo colour 3	R: 68, G: 106, B: 164
COBALT logo subtitle colour (claim)	R: 48, G: 90, B: 148

4.6. Institutional profile of consortium partners

For correctly mentioning the institutional profiles for relevant project publications, the Project Coordinator prepared a template MS word file. For project publications or promotional material, in general, the correct logos and institutional profiles are mentioned below:

Vienna University of Economics and Business, Institute for Managing Sustainability (Coordinator),
Vienna, Austria

Ecologic Institut gemeinnützige GmbH,
Berlin, Germany

BIO Intelligence Service,
Paris, France

Luleå University of Technology, Department of Civil, Environmental and Natural Resources Engineering,
Luleå, Sweden

TECNOMA SA, TYPSA Group
Madrid, Spain

National Association for Consumers' Protection and Promotion of Programs and Strategies,
Bucharest, Romania

4.7. Activities plan

The following list comprises all relevant project activities (i.e. meetings, events such as EU and Regional workshops as well as the opening and the closing conference) and describes their general purpose, responsible partner for organisation, the actual or planned date (according to page 21 Annex I part A to the GA).

Table 3: Activities plan

Event	Location	Actual date[2]	Responsible partner	Purpose and content
M5.1 kick-off	Vienna	M1 (May,	WU Wien	Revisiting the projects overall outline, tasks and objectives; general planning of individual WPs

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[2] Dates in italic refer to dates initially included the GA page 21 Annex I part A to the GA.

Event	Location	Actual date[2]	Responsible partner	Purpose and content
meeting		2013)		and future activities
M1.1 baseline workshop, back to back to the M5.2 1st AB + EIP meeting	Brussels	M5 (13 September, 2013) / *M4 (August, 2013)*	Ecologic / WU Wien	Discussing and elaborating in collaboration with the Advisory Board and representatives of the EIP the opening conference agenda, and receiving general advice for the project
M1.2 Opening conference	Brussels	M7 (28-29 November 2013)	Ecologic	Fostering the dialogue on societal awareness and necessary skills for a sustainable use of raw materials
M2.1 1st European dialogue	Brussels	M10 (February, 2014)	BIO IS	Fostering a European dialogue between civil society and industry in framework for targeted EU-level and thematic communication on sustainable management of raw materials
M5.3 2nd project progress meeting + M5.4 2nd AB / EIP meeting	Brussels	M10 (February, 2014)	WU Wien	Back to back with 1st European dialogue; coordination of activities of AB/EIP and advice of project activities
M2.2 2nd European dialogue	Brussels	M13 (May, 2014)	BIO IS	Fostering a European dialogue between civil society and industry in framework for targeted EU-level and thematic communication on sustainable management of raw materials
M2.4 1st Regional dialogue – North Sea	Stockholm (Sweden)	*M16 (August, 2014)* / M15 (September, 2014)	LTU	Fostering a Regional dialogue between civil society and industry in framework for targeted regional and thematic communication on sustainable management of raw materials
M2.5 2nd Regional dialogue – Iberian peninsula	Madrid (Spain)	*M18 (October, 2014)* / M14 (June, 2014)	TECNOMA	Fostering a Regional dialogue between civil society and industry in framework for targeted regional and thematic communication on sustainable management of raw

Event	Location	Actual date[2]	Responsible partner	Purpose and content
				materials
M2.6 3rd Regional dialogue – Eastern Europe	Bucharest (Romania)	*M20 (December, 2014)* / M21 (November, 2014)	ANPC Romania	Fostering a Regional dialogue between civil society and industry in framework for targeted regional and thematic communication on sustainable management of raw materials
M2.3 3rd European dialogue	Brussels	M21 (January, 2014)	BIO IS	Fostering a European dialogue between civil society and industry in framework for targeted EU-level and thematic communication on sustainable management of raw materials
M5.3 3rd project progress meeting + M5.6 3rd AB / EIP meeting	Brussels	M21 (January, 2014)	WU Wien	Back to back with 3rd European dialogue; coordination of activities of AB/EIP and advice of project activities
M1.4 Closing conference	Brussels	M23 (March, 2015)	Ecologic	Integrate COBALT findings and help fostering the dialogue and taking it further beyond the project's duration through establishing networks and partnerships

5. Guidance tool for event organisation

The below mentioned list of items acts as a guidance tool for the organization of smaller workshop-like events (i.e. three European and three regional Workshops) during the course of the project.

Table 4: Event organisation guidance tool and proposed time schedule

Four months before the event at the latest
Secure personnel
Decide who the contact person from your side is and nominate her/him to the project co-ordinator and the WP 2 leader (we suggest that more than one person organizes the workshop for reasons of health risks, overload, unexpected duties or family matters).
Fix the exact date
Check if there are any other big events in your geographical area (e.g. big international

congresses) as these events might block all available hotels and venues.

Check if there are any other Europe-wide events on sustainable raw material management (supply and use) which might compete for the same participants.

Fix the exact day in collaboration with the project coordinator, work package 2 leader and respective regional partners

Fix the venue

The venue should offer
- An entrance area for the reception desk
- A room for the lunch break and the coffee breaks
- A room for the respective number of participants (with variable tables, chairs) with data projector and perhaps a wall space to hang posters/flipcharts etc.

Please be aware that you need at least three offers for the venue.

Develop a draft cost plan and sign all relevant contracts (for venue, catering and evenings) as soon as possible so the prices and conditions remain fix.

Organise catering (prefer organic food, take care of special needs) and book the dinner location. Please be aware that you need at least three offers.

Approach keynote-speakers, potential sponsors and partners

You could attract potential sponsors and partners (e.g. national ministries, city administration). Please approach them only after discussing this issue with the work package 2 leader and respective regional partners

Advertise the event

Create your event flyer/invitation email based on the COBALT event flyer blueprint (include location, hotels, date, keynote presenters, guiding questions etc.), send it to the work package leader for approval and then to all consortium partners to include it in their newsletters/emails.

The whole consortium, and in particular the partner organising the event in cooperation with the WP 2 leader and the project coordinator, is responsible for advertising the event. All partners are asked to advertise all COBALT events through their networks, newsletters, websites.

Set up a database of potential participants (based on the stakeholder mapping in task 4.2 and conference contact database in task 1.2).

3 months before the event at the latest

Invite participants

Prepare an email invitation

Approach potential participants individually (e.g. by sending them a personal invitation). Consider the following criteria when confirming their participation:
- Regional coverage: see selection of countries for the respective regional dialogue
- European coverage: try to get a well-balanced representation of EU Member States
- Stakeholders from industry and civil society
- EU level and Member States
- Gender balance

Continue advertising the event

Send out the reminders for invitation on regular basis, disseminating the final version of the agenda + invitation email through your networks, newsletters, websites

Prepare and provide content

Prepare a workshop agenda on the main content issue of your event and ask involved consortium partners for feedback

Start working on the Storyboard/Facilitation Board (i.e. who is doing what and when, what material is needed etc.) for the event

<u>Monitoring of progress</u>

Monitor the number and spread of applicants regularly and fill gaps (if necessary)

Modify your cost plan regularly and monitor your costs to ensure that you stick to the maximum budget you have at hand

1 week before the event at the latest

<u>Finalize responsibilities</u>

Finalize the storyboard for the event and send it to the WP leader, the respective regional partners and the coordinator (who is doing what and when, what material is needed etc.).

Ask potential moderators and keynote speakers
- to confirm their participation
- to send their presentations
- for their mobile numbers (in case their plane connection fails)

Use a mobile phone as a 'event hotline' (for emergency cases).

Clarify reimbursement (potentially for keynote speakers)

Disseminate the session outlines to the COBALT team members joining the event

We suggest to organize a short meeting with the whole team involved and all moderators at all breaks to exchange experiences and potentially modify the storyboard (if necessary).

<u>Send out the welcome package to all participants</u>

Agenda

Venue, map, event hotline

Participant list and speakers biographies (if available)

<u>Print outs</u>

The welcome package

List of participants (to be signed by each of them)

Name badges including also the company name

In case you have sponsors do not forget to print their logos in high resolution and to display them (this can easily be forgotten).

During the event

Detailed Storyboard will be used during the events

Arrange a meeting with all partners involved and the host on the evening of the 1st day to discuss details and open questions

Arrange a meeting (virtual or physical) with the moderator (even if part of the consortium) of the event before starting the event for "fine-tuning"

Take photos of the event (policy fact sheet and/or press release)

Secure all results (posters, pin boards, flipcharts)

Prepare and secure content for a press release and send it together with the press kit (including background-information about the project) to the media within one week (not the week after!)

Summarize the lessons learned and forward them to the WP 2 leader and the project co-ordinator (so that they can be used in the upcoming event)

Two weeks after the event the latest

Pay all subcontracts

Communicate reimbursement deadline (if necessary)

Send written documentation of the event to participants (and additionally if ready the policy fact sheet)

Put documentation on the COBALT website

Annex A: List of COBALT deliverables (chronological order)

Del. No.	Deliverable name	WP No.	Nature	Dissemination level	Delivery date
D1.1	Tentative list of relevant conference topics, target groups/participants and speakers	1	Report	PU	M4 (August 2013)
D5.1	Standard Operating Procedures	5	Report	PU	M4 (August 2013)
D4.1	Website (platform)	4	website	PU	M4 (August 2013)
D3.1	Preliminary report on available courses and existing skill shortages	3	Report	PU	M7 (November 2013)
D1.2	Opening conference report on "Setting the scene"	1	Report	PU	M9 (January 2014)
D2.1	Adaptation Report on EU Civil Society–Industry Dialogues	2	Report	PU	M15 (July 2014)
D3.2	Draft course syllabi for university education and blueprints for industry training courses and courses for geological surveys	3	Report	PU	M15 (July 2014)
D2.2	Regional Civil Society-Industry Dialogue Report	2	Report	PU	M21 (January 2015)
D2.3	Synthesis Report on Dialogue Insights	2	Report	PU	M22 (February 2015)
D3.3	Final report on skill shortages and means of addressing them (including pilot tested)	3	Report	PU	M23 (March 2015)
D4.2	Draft COBALT declaration as input into the closing conference		Report	PU	M23 (March 2015)
D1.3	Closing conference report on "Findings, partnerships and networks"	1	Report	PU	M24 (April 2015)
D4.3	COBALT declaration from the closing conference	4	Report	PU	M24 (April 2015)
D4.4	network report	4	Report	PU	M24 (April 2015)