Building a Communications Strategy

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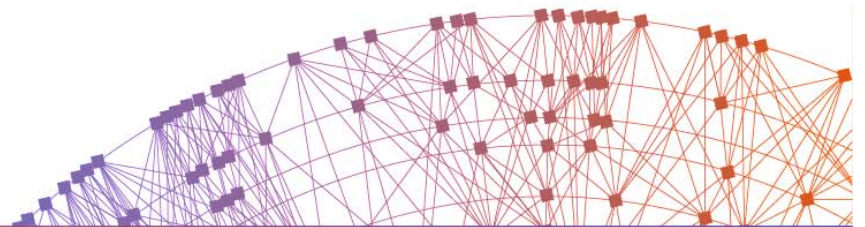
www.e-sciencetalk.eu

Content

- Why communicate?
- Lessons learnt through dissemination
- Key elements of a communications strategy
- Talking to different audiences
- What the European Commission wants to see
- **PRACTICAL: Key messages + audiences**
- Reporting and measuring outcomes
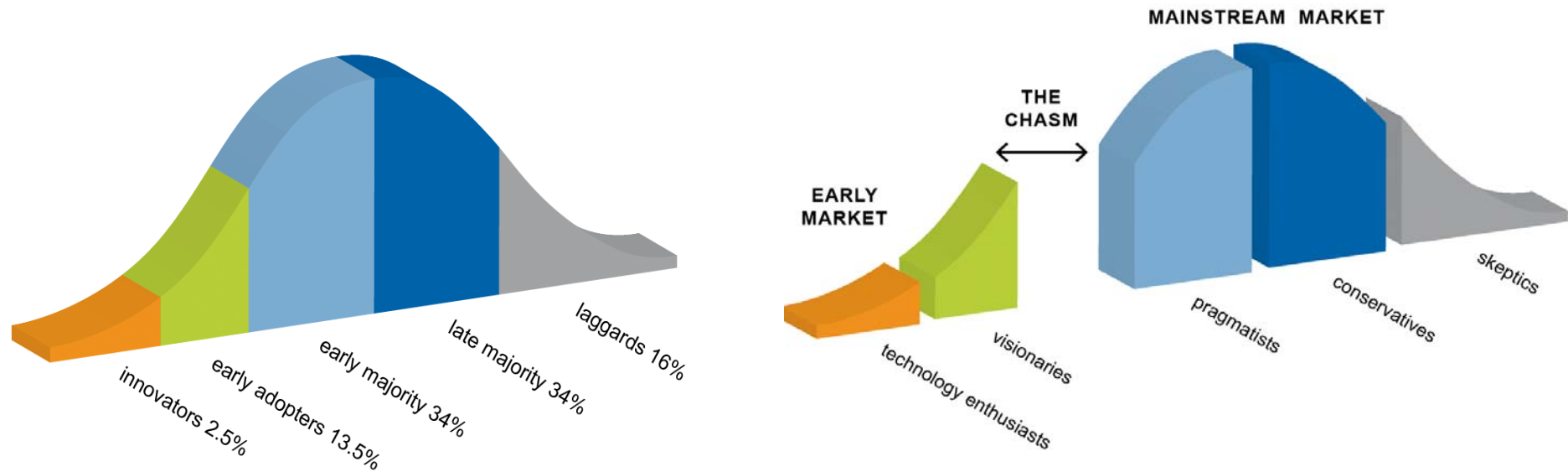- Metrics and statistics

Why communicate?

Bridging the chasm

- Researchers are increasingly turning to e-science
- A chasm exists between early adopter communities eg HEP and others eg humanities

Crossing the Chasm by Geoffrey A. Moore

Users of grid computing

Virtual Organisations and jobs
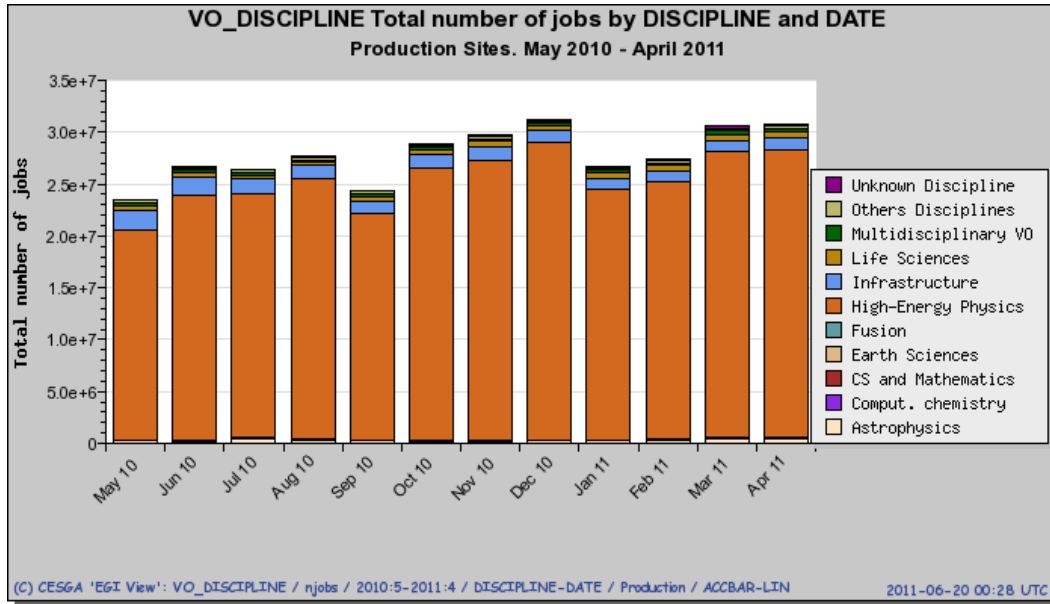
New additions to the
**Applications
Database** during
EGI-InSPIRE Year 1

93 new applications by discipline

- Life Sciences
- Computer Science and Mathematics
- Others
- Computational Chemistry
- Earth Sciences
- Fusion
- Multidisciplinary
- Astronomy, Astrophysics, and Astro-Particle Physics
- High-Energy Physics
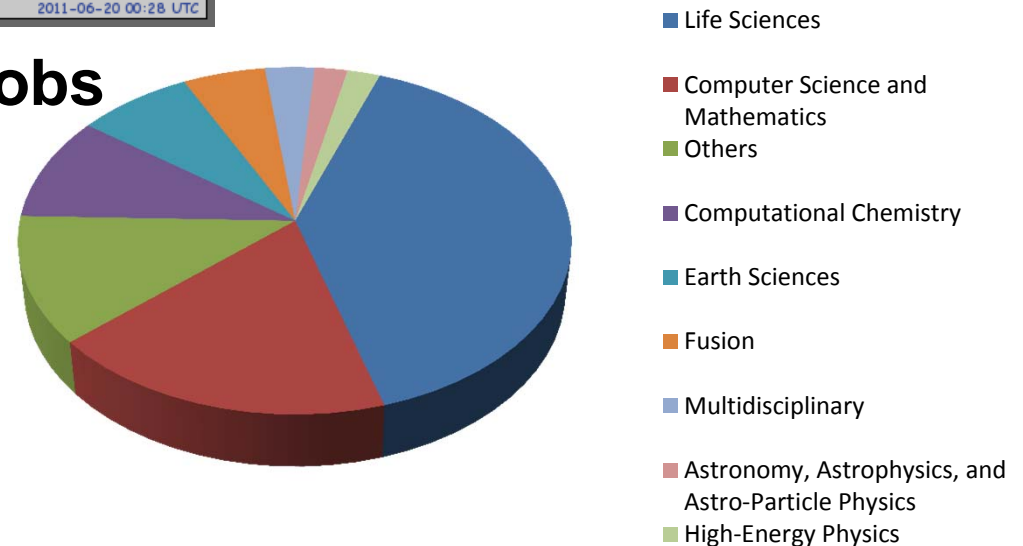
Why communications?

- **Publicise project results through case studies**
  - Show funders that the work has an impact
  - Inform new users of what is possible with the e-infrastructure

- **Build a sense of community**
  - Publicise the outcome of events
  - Ask researcherss to blog and share their work
  - Use social media to encourage networking

- **Sustainability of the e-infrastructure**
  - Bringing new communities on board brings in new resources and funding for the future

Lessons learnt

How to communicate?
What works and what doesn't?

Lessons from EGEE

- Communicate regularly with your colleagues eg newsletters, emails, updates, web news
- Collaborate with other projects – spread the load and share communications channels
- The press are interested in what e-infrastructures are for, not how they work
- Build a story – publish a series of articles in one publication over time to engage an audience
- Establish relationships with media partners eg iSGTW, HPCwire
- The LHC start up generated a lot of media interest, which included WLCG and EGEE

The European project Enabling Grids for E-sciencE (www.eu-egee.org) built the largest distributed computing infrastructure in the world – aiding the work of 13,000 scientific researchers in every corner of the globe and contributing to hundreds of discoveries. At the end of the project (April 2010), the grid infrastructure provided access to 140,000 CPU cores and 25 petabytes of disk storage, 40 petabytes on tape.

EGEE began by working with two scientific groups, high energy physics and life sciences, and grew to support astronomy, astrophysics, computational chemistry, computer science, earth sciences, and fusion. The wider user community runs applications from research domains as diverse as multimedia, finance, archaeology, and civil protection. EGEE helped port a diverse spectrum of applications to the EGEE grid infrastructure, to demonstrate its potential for scientific analysis and scientific collaboration (success stories http://www.lpds.sztaki.hu/gasuc/?m=7). The Application Database (http://appdb.eu-egee.org/) contains a more exhaustive list of the applications running on the EGEE infrastructure.

Although grid access can help individual researchers in their work, the most important benefit of the grid is the ease of scientific collaboration. Members can share data, specialized resources, algorithms, and expertise. Researchers connect through Virtual Organizations (VOs). These VOs are a way to control access to grid resources. End users can join existing VOs or create new VOs tailored to their needs. Those with existing computing resources can also federate them with the EGEE grid infrastructure to facilitate load balancing with other users and groups.

Lessons from EGI

- Make your materials visually appealing
- One size does not fit all – channel content to the right readers eg general public, users, new users
- Case studies, case studies and more case studies
- Annual reports – give a professional impression
- Goodies! T-shirts, pens, gadgets are always popular
- Make events interactive – use hash tags, blogs, mobile phone apps
- Leverage publicity around events as much as possible

Key elements of a communications strategy
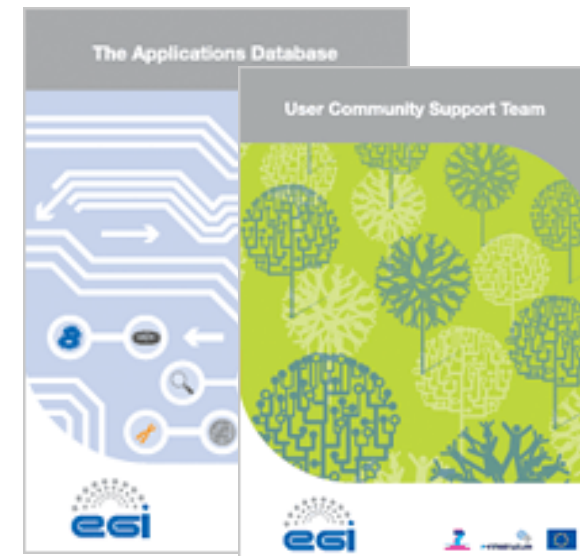
Communications Strategy

- Messages: What to say
- Target audiences: Who to say it to
- Communications plan: When to say it
- Communications channels: How to say it
- Outcomes: How do we know it worked
- Metrics and statistics: Did it work?
- Impact: Will it go on working?

EGI target audiences

Primary audiences:

- New user communities (social sciences, environmental sciences, humanities etc.)
- Existing user communities (life sciences, physics, computational chemistry etc.)
- Journalists and media
- General public
- National Grid Infrastructures (NGIs) and European International Research Organisations (EIROs)
- Resource providers
- Collaborating projects
- Decision makers
- Governmental representatives

Secondary audiences

- Secondary schools, educational institutions
- Local communities in the partner countries

Defining audiences

- What is special about this audience?
- Why is this audience important?
- What will success in communicating to this audience look like?
- How will we achieve success in reaching out to this audience?
- What techniques have worked in the past?
- What are the challenges?

Talking to different audiences

Current key messages are:
- What the project is about;
- What resources, infrastructure and services the project can provide;
- What applications/scientific fields are already using the EGI;
- Benefits to a range of potential users;
- Comparison of grids, cloud computing and other distributed computing infrastructures;
- The project's potential to revolutionise the way scientists work;
- How to get involved;
- Major developments such as:
  - New applications;
  - Key milestones;
  - Key events;
- Who is involved in the project;
- The future beyond EGI-InSPIRE for a sustainable infrastructure.

Targeted messages

For the general public:

- EGI gives scientists the computing power they need to analyse the vast amounts of data pouring from large-scale experiments, such as the Large Hadron Collider and the ESFRI projects.

- Modelling the natural world requires international collaboration. EGI gives scientists the computing power and collaboration platforms they need to understand phenomena such as climate change, ocean currents or how drugs work in the body.

For scientists:

- EGI provides 350,000 processor cores and more than 250 petabytes of tape and disk storage to 21,000 users across Europe and beyond.

- You don't have to be a computer expert to benefit from expert computing. EGI is the gateway to hundreds of cutting-edge software packages ready to use across many fields.

- EGI nurtures virtual research communities across all fields of science and works closely with users to provide an integrated e-Infrastructure.

Targeted messages

For funders and stakeholders:

- EGI delivers sustainable, integrated computing services to European scientists and their international partners.

- EGI integrates new technologies to support the Digital Agenda's vision for a Europe with no boundaries or obstacles to the free circulation of knowledge.

- EGI provides a pan-European e-Infrastructure that is more efficient and better value than the sum of each country's individual efforts.
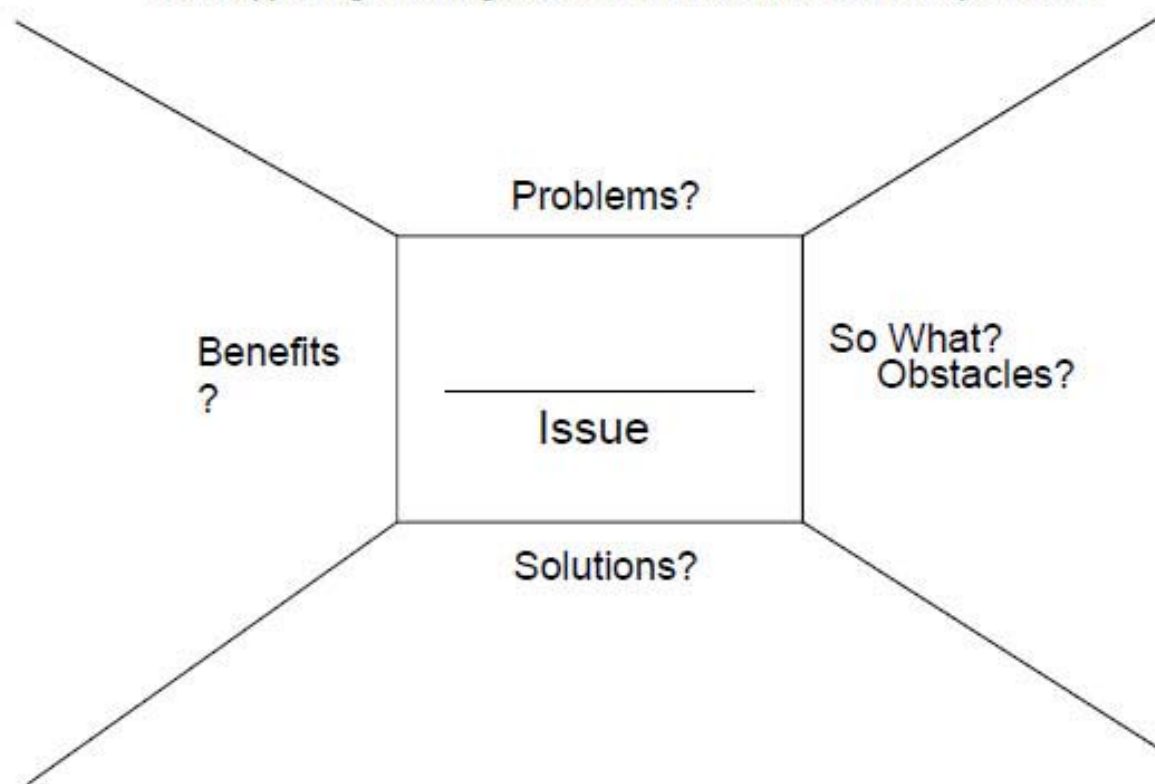
For all audiences…

- Know your message or story
- Identify the "so what" element for different groups
- Eliminate jargon from your story
- Find colour, anecdote, personalities
- Look for novel, interesting, unexpected applications

What the EC would like to see

Communication for the EC

- *Why communicate?*

  - Everyone is a stakeholder.
    We have to get into the debate – why continue this research?
    Give the EC the tools to justify the added value.

  - Success is not just measured by the quality of the research but ALSO by how much it has been noticed.

  - Demonstrated impact means that the EC can argue to invest in this work in the next Framework Programme.

  - Is the message that you are sending being received? Aim for communication (2 way) instead of dissemination (1 way).

- *How to communicate?*

  - Put yourself in the audience's shoes, adapt the message to match.

  - Remove jargon, explain simply, avoid overloading with the one way type of information.

Communication for the EC

- *Work with the EC*
  - Let them know in advance of successes to allow joint PR activities
  - Social media channels available from the EC:
    - Digital Agenda Facebook http://www.facebook.com/DigitalAgenda
    - Twitter http://twitter.com/digitalagendaeu
    - Blog http://blogs.ec.europa.eu/digital-agenda
    - Technology Marketplace on Cordis http://cordis.europa.eu/marketplace
  - Make the website part of the overall communications strategy and keep it up to date
  - Only issue press releases when they are newsworthy and timely, target local news, your MEPs, and social media.
- *Acknowledge support from the EU please!*

PRACTICAL: Key messages and audiences

Practical: 20 mins

- Move into groups of 4 or 5
- Identify your key audiences – top 5
- Brainstorm some general messages
- One or two targeted messages for your top audience

Reporting and measuring outcomes

Channels

- Events
- Website
- Materials and publications
- Media and PR
- Social media

-> SET TARGETS FOR THE OUTCOMES

Metric and statistics

What to measure?

- Concrete metrics ie the size of your infrastructure, number of users

- Strategy metrics – are you meeting the wider strategic goals?

- ERINA+ and eFiscal – measuring the socio economic impacts of EC projects
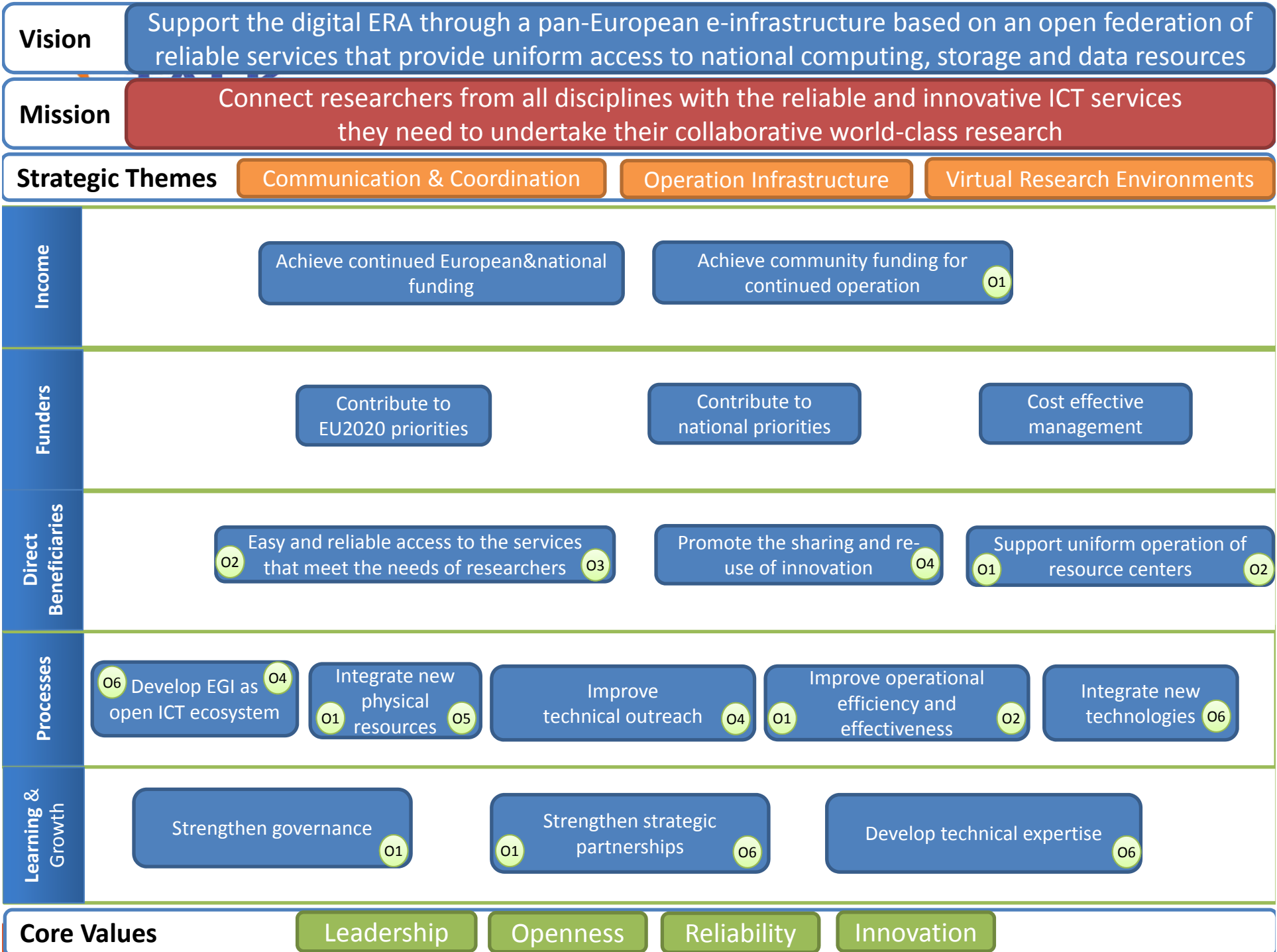
Stretch Targets for EGI

No	Objective Summary	Metrics	Target PY1	Target PY2	Target PY3
PO1	Expansion of a nationally based production infrastructure	Number of resource centres in EGI-InSPIRE and integrated partners (M.SA1.Size.1)	300	330	**350** (355) (355)
		Number of job slots available in EGI-InSPIRE and integrated partners (M.SA1.Size.2)	200,000	250,000	**300,000** (325,000) (333,000)
		...ource centre functional services ...n.5)	90%	91%	**95%** (96%) (97%)
		...functional services ...ns.4)			**97%** (98.5%) (99%)
		...cal operations tools ...ns.6a)			**97%** (98.5%) (99%)
PO2	Support of European researchers and international collaborators through VRCs	Number of papers from EGI Users (M.NA2.5)	50	60	**70** (80) (90)
		Number of jobs done a day (M.SA1.Usage.1)	500,000	525000	**1.2M** (1.4M) (1.5M)
PO3	Sustainable support for Heavy User Communities	Number of sites with MPI (M.SA1.Integration.2)	50	100	**120** (130) (140)
		Number of users from HUC VOs (M.SA1.VO.6)	5000	5500	**12,000** (15,000) (17,000)
PO4	Addition of new User Communities	Peak number of cores from desktop grids (M.SA1.Integration.3)	0	0	**1,000** (5,000) (7,500)
		Number of users from non-HUC VOs (M.SA1.vo.5)	500	1000	**10,000** (12,000) (13,000)
		Public events organised (attendee days) (M.NA2.6)	1500	2000	**15 000** (17 000) (19 000)
PO5	Transparent integration of other infrastructures	MoUs with resource providers (M.NA2.10)	3	5	**4** (5) (5)
PO6	Integration of new technologies and resources	Number of HPC resources (M.SA1.Integration.1)	1	3	**50** (50) (50)
		Number of resource centres part of the EGI Federated Cloud (M.SA2.19)	0	1	**10** (15) (20)

Target – expected
Target – optimal
Target – stretch

Strategic Metrics

EGI Balance Scorecard relates the
EGI Strategy to the metrics gathered

Based on linked performance measures from a range of perspectives:

- Learning & growth – how EGI must develop as an organisation
- Processes – where to excel to satisfy beneficiaries and funders
- Direct beneficiaries – needs of the beneficiaries
- Funders – return on investment
- Income – effect of success on income

Vision	Support the digital ERA through a pan-European e-infrastructure based on an open federation of reliable services that provide uniform access to national computing, storage and data resources
Mission	Connect researchers from all disciplines with the reliable and innovative ICT services they need to undertake their collaborative world-class research
Strategic Themes	Communication & Coordination — Operation Infrastructure — Virtual Research Environments

Income

Achieve continued European&national funding

Achieve community funding for continued operation (O1)

Funders

Contribute to EU2020 priorities

Contribute to national priorities

Cost effective management

Direct Beneficiaries

(O2) Easy and reliable access to the services that meet the needs of researchers (O3)

Promote the sharing and re-use of innovation (O4)

(O1) Support uniform operation of resource centers (O2)

Processes

(O6) Develop EGI as open ICT ecosystem (O4)

Integrate new physical resources (O1) (O5)

Improve technical outreach (O4)

(O1) Improve operational efficiency and effectiveness (O2)

Integrate new technologies (O6)

Learning & Growth

Strengthen governance (O1)

(O1) Strengthen strategic partnerships (O6)

Develop technical expertise (O6)

Core Values — Leadership — Openness — Reliability — Innovation

Strategy perspectives

- Learning & growth
  - Develop technical expertise
  - Strengthen strategic partnerships
  - Strengthen governance
- Processes
  - Develop EGI as an open ICT ecosystem
  - Integrate new physical resources
  - Integrate new technologies
  - Improve technical outreach
  - Improve operational efficiency and effectiveness
- Beneficiaries
  - Easy and reliable access to the services that meet the needs of researchers
  - Promote the sharing and re-use of innovation
  - Support the uniform operation of resource centres

- Funders
  - Contribute to EU2020 priorities
  - Contribute to national priorities
  - Cost effective management
- Incomes
  - Achieve continued European and National funding
  - Achieve community funding for continued operation

Key points

- To bridge the chasm new users need to know what the e-infrastructure can do
- Demonstrating the impact of your work means it is more like to attract future funding from the EC
- Match the message to your audience
- Collaborate with other projects to maximise impact
- Try out new channels