

**EGI-Engage**

Deliverable Review Form

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| **Details of the document being reviewed** | | | |
| *Title:* | **D2.1 “Communications, Dissemination and Engagement Strategy”** | *Document identifier:* | **EGI-doc-2489-v3** |
| *Project:* | **EGI-Engage** | *Document url:* | **https://documents.egi.eu/document/2489** |
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| **Identification of the reviewer** | | | |
| *Reviewer:* | **Yin Chen** | *Activity:* | **Senior Technical Outreach Officer** |

**General comments on the content**

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| **Comments from Reviewer:** |
| It is a good quality report describes plans and strategies in 3 dimensions of engaging EGI user communities.  Apart from the descriptions of general activities, Communication strategy shall give more emphasis on the considerations of how to maximize the influence of EGI.  Engagement plan identifies a long-list of targeting communities for EGI Engage to interact. It seems the plan is too ambitious to be accomplished. It should provide sounds working approach and strategies to explain how these could be achieved.  There are some overlapping areas between Communication activities and Engaging Outreach activities. They should have different objectives and focuses. It should clarify these and explaining the interactions in-between. |
| **Response from Author:** |
| At the beginning of section 5, we explained the origin of resources to address the work-plan.  About communication vs outreach, the first is defined in the introduction, while the latter in section 4.2, bullet 1 |

**Additional comments**

*(not affecting the document content e.g. recommendations for the future)*

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| **From reviewer:** |
| **Communication strategy**  It shall have more emphasise on **how to maximize the influence of EGI**.  In the report, it mentioned the main objective is to support Dissemination and Engagement activities, however, It seems to me could be **more boarder** that that. It need clever strategies that how to increase EGI global-wide influence, how to make EGI more visible in various important international networking events, how to reach out to all potential users including future users such as university/high-school students, which are potential users in 4-5 years.  It mentioned the use of website, blogs, newsletters and so on. Similar communication methods are used by many other organisations. A community user each day would receive many of such. **How we can make EGI’s website be more attractive**, the information send out can catch more eyeballs?  Apart from maintaining efficient communication channels, to strengthen the internal community communication, it may be useful **to establish a sense of community identity -- what is EGI-Engage community**, what is the soul to tie everyone together? **How EGI can better server the community**, get them more involved, listen to their voices, and serve their needs.  **Easy-to-use** **is current bottleneck** for EGI technology to be widely adopted. We shall learn experience from successful commercial providers. We may need to provider more detailed description of the service provide, provide show room to active introduce new developed services to community with running video demonstration, enable simple one-click-installation, provide help desk /discussion forum where a user can find help.  **Engagement**  Section 4 Engagement Strategy seems from another EGI report, it needs to maintain the synchronisation of the updates of each.  For **EGI engagement target groups/collaborations**, other areas could include: 1) interoperability with other e-Infrastructures; 2) EGI globalisation; 3) Universities, e.g., inject EGI training courses into school teaching modules 4) National-level public sectors, support government projects.  From the description, the **Outreach activities seems very much overlapping with the communication** **activities**. There should be distinguishing between the two. The main objective of engagement should be to “**guide a user drive on the slop road until they join the highway safely and skilfully**.” The process could be designed in a systematic way thus **to improve the efficiency and quality of services**. Consider banking services for opening an account for a customer. Each customer is assigned with one staff so as to encourage the establishment of a trustworthy long-term partnership with the customer. Then a package of service starts and this banking staff helps the customer to go through each step in the process. In the case of EGI engagement, for each community, a staff from engagement team to be assigned to help the user walk through the journey from a beginner to a long-term customer. A EGI engagement service pack could include, training the technology, help the user get CAs, requirements collection and analysis, discussion meeting with technology and resource providers, set up testbed, and in-depth training and technology helpdesk etc.  Coming to the stage when gathering relevant experts from EGI and broader e-Infrastructure communities to establish implementation for identified use cases, it would be good **in further to establish and maintain a registry of a EGI technology providers and experts resource**. By registering to registry an experts shall understand their basis responsibilities in responding calls for engagements. |

**Detailed comments on the content**

| **N°** | **Page** | **§** | **Observations** | **Reply from author (correction / reject,  …)** |
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| **1** | **6** |  | **When mention “**The Communications Team writes an article**”, is this a repeating sentence or another example?** | **It’s repeated.** |
| **2** | **7** |  | **When mention, “…** build on the added values, lessons learned and relationships established during the previous EGI-InSPIRE project**”, Is it only based on previous experience from EGI-InSPIRE? Why not from external sources and state-of-the-arts?** | **It’s implicit.** |
| **3** | **7** |  | **Subsection 2.1 lists a numbers of elements for corporate image, what are the considerations in design to maximise the impact and influence of EGI? May be good a couple of sentence to explain why templates is relevant.** | **The templates are covered in the Quality Plan – they are here listed for completeness. Design considerations are outside the scope of this document.** |
| **4** | **9** |  | **Questions to sub-section 2.2.2 publications, how to evaluate the listed publications are well received by users and to make impacts?** | **We have metrics for this – the text is now updated.** |
| **5** | **11** |  | **When mention the participation of external events (2.3.2), it would be good to explain what is the principle in the selection of the external events to attend? Related to what is the strategy to maximize the impacts and benefit for EGI?** | **Yes.** |
| **6** | **14** |  | **When mention “The project’s technical results** will be exploited by direct participation and influence**”, Can you give some examples or plan in EGI-Engage? Which technical results? Targeting which standard?** | Sentence removed, it was not clear and not essential in the text |
| **7** | **15** |  | **When mention, “**This will allow the EGI community of service providers to operate as a **block**, rather than a fragmented collection of national entities…**”,** do you mean integrated/humanised/unity ? | **Yes, that is exactly what the expression ‘as a block’ means.** |
| **8** | **15** |  | **When mention, “**The following figure shows the **flow of information** from the target groups through and the policy boards to influence the evolution of services and solutions**”, it’s better to provide some description /reference for the information flow.** | **done** |
| **9** | **16** |  | **Figure 2,**  **shall provide some descriptions/reference of the Stakeholders, e.g., what is NIL\***  **Why some stakeholders e.g., 10 UCs, 5 RPs attach to SIB?**  **What the types and direction of the arrows stand for?** | **Expansion of NIL added to the caption**  **Those stakeholders are part of the SIB, as explained in the text.**  **The arrows mean interaction – added for clarity in the caption** |
| **10** | **16** |  | **When mention, “**Promote the results at research-focused meetings, through the **Research Champions** and presence at events”, **it’s better to give reference of the Research Champions.** | **Done** |
| **11** | **17** |  | **In subsection 3.2,3.2, is there any policies related to the quality assessment of deposited software?** | **Software is included in UMD only when passes quality criteria.** |
| **12** | **17** |  | **When mention, “…**the consortium will consult the OSS Watch**”, it’s better to give the reference of OSS.** | **done** |
| **13** | **20** |  | **When mention, “**this data will be **permanently** archived … during the lifetime of the project**”. Sounds a bit conflict. Is it better to change to be “persistent”? Another related question is what happens after the project comes to the end?** | **The sentence wanted to say that the data will be archived before the end of the project; Zenodo guarantees a long-term storage (CERN standards). Sentence improved** |
| **14** | **22** |  | **Subsection 4.1 gives a number of target groups EGI engagement would work with. What are the balances in supporting those identified target groups?** **What are the objectives to be achieved with each collaboration category?** | **The objective is the same in each group: Help the members of the group become active and self-sufficient users of EGI. The way to achieve this is different.**  **Further information has been now added on the priorities for EGI.eu and for the NGIs in engaging with the different groups. (in section 4.2 Engagement Blueprint)** |
| **15** | **25** |  | **When mention, “**Potential areas of collaborations between EGI members and industry**”, it may also inludes: 1) consultancy 2) knowledge transferring, e.g., training 3) research products transferring** | **Consultancy, Support and joint developments are also in the list. No need for further items.** |
| **16** | **26** |  | **When mention, “**A three-tier structure for engagement…”, **it’s better to give definition of the 3-tier: Business Engagement Programme Member, Business Associate, Business Partner, what are they?** | **This section was removed because this is out of date.** |
| **17** | **27** |  | **The outreach activities seems an overlapping areas with communication activities described in section 2. How to distinguish the two. Or simply call engage/establishment of the collaborations. Outreach sounds an action going out, but there are cases that communities initiate the requirements.**  **The main objective of engagement at this stage seems to be “guide a user drive on the slop road until they join the highway safely and skilfully.”** | **Why do we need to distinguish between the two?**  **As the introduction tries to explain, there is overlapping in the communications-outreach-dissemination continuum. This is not, in my view, a bad thing!**  **A sentence was added to the section on outreach to state that Outreach builds on the communication activity and uses it in a pro-active way targeting scientific users and user groups.** |
| **18** | **28** |  | **When mention the duties for EGI.eu staff, many actives seems overlapping with communication activities in section 2.** | **See reply to #17** |
| **19** | **29** |  | **At the beginning of 4.2.2, when mention, “**During this phase**”, it’s rather better to explain when the scoping stage starts?** | **Text was changed.** |
| **20** | **32** |  | **Section 5 gives plans for the next period, which identifies targeting communities for EGI Engage to interact. It is not convincing that the plan could be accomplished. In particular, for a long list of potential user communities, it should provide sounds working approach and strategies to explain how these could be achieved.** | **I don’t know what more details could be written. There is timeline (April 2016), there is owner (e..g CCs, specific NGIs, etc.). Section 4.3 describes the tools and approaches.** |
| **20** | **35** |  | **When mention, “**The below table presents the responses that have been received from those NGIs that did not respond to the 2015 survey**”, It should give information about the whole picture including those responded to the 2015 survey, or to explain why this partial information is relevance or sufficient?** | **The survey responses from 2014 and from 2015 provide the complete picture.**  **Unfortunately none of the EGI surveys have ever had 100% response rate that is the reason I had to use 2014 data where no 2015 is available.** |
| **21** | **48** |  | **In subsection 5.1.3, it’s better give brief explain what Virtual Team Projects are.** | **Added.** |

**English and other corrections:**

Note: English and typo corrections can be made directly in the document as comments.