ETHICS GUIDELINES

The following recommendations have been written on the basis of the comments collected throughout the workshop with the partners. They should be seen as complimentary to the deliverable review process and the templates/checklists already developed in the project as specified in the Project Management Manual.

PLANNING THE WORK ON THE DELIVERABLES AND DOCUMENTS

Before:

- Set in advance a meeting with the partners involved in the deliverable to ensure that the dialogue and planning process are interactive. The purpose of these meetings with the reviewers and the potential contributors should aim to define with them deadlines and level of their involvement in the work, and to present the conceptual idea at the basis of the deliverable (when possible, the TOC). This should be not less than 2-3 months before the deadline and 1-2 months before the partners will be called to contribute, depending on the extend of the contribution
- The review process should be planned according to the timeline and the needs of the deliverable's authors and the reviewers
- The number of reviewers/inputs should be limited to a narrow group, not more than one-person per partner to ensure that the feedback is more focused.
- Clear communication on the tasks/expectations of the contributors/reviewers

Key takeaways:

- Inform in advance the reviewers about the deadline and the planning process for the review.
- Number of people involved for the review should be limited
- Provide and guarantee a clear communication

During:

- Deadlines and delays: remember to always inform partners about the changing in the timeline/deadlines. Always explain the reasons of the delays and make sure the delays are accepted by other partners involved in the writing of the deliverable or in its review.
- Inform the partners and agree with them about the criteria used to establish the authorship in the deliverable before its submission
- Flexibility in the timeline should be considered (both for the authors and the contributors) on a case-to-case basis, but remember that this should not be the norm
- When asking support to the partners, please consider only the working days (Monday to Friday) and give no less than 5 days to answer to your request (shorter deadlines should be agreed upon directly with the partners and be considered as an exception, thus you should try to do your best to avoid this type of situation)
- Sometimes a phone call can solve small urgent matters/clarification
- Try to be flexible, considering that in some cases it is not possible to satisfy your requests
- Review process: be sure to answer the requests of the reviewers and inform the coordinator if you have followed their recommendations or not about core aspects/major comments (and in case you don't, provide an explanation). The coordinator will then discuss with reviewers and deliverable's author to clarify any major conflicts in the review feedback and amendments if needed before submitting.
- Constructive feedback is expected and needed

Key takeaways:

- Inform partners about any changes related to deadlines, criteria, texts, or any information related to the document
- Give partners the right time to answer the request and be flexible

After:

- Present the deliverable to the partners who have contributed and in general to the consortium
- A different format than the kind of presentation held previously is needed, avoid long explanations and presentations

Key takeaways:

- Present the deliverable to the consortium

TO ORGANIZE AND PLAN MEETINGS

Before:

- Because we are spending a lot of time on the laptop, think well if the meeting is effectively necessary before planning it
- Take in consideration the risks of burnout of home-working during pandemic and meetings fatigue
- Take a look to the meetings timeline to be sure to not overload partners
- When possible (and especially if the meeting is 'mandatory' or important), share a doodle to select the best time for all the participants (give them some days to answer, at least 3-4 days)
- When possible, avoid organizing meetings out of the working times of the different countries (take in consideration also the number of hours every partner has on the project). Don't start at time sharp: allow people to join meetings (9:05 e.g.). In general, the best would be to have meetings between 9-12 and 14-16
- Share a detailed agenda of the meeting not less than 5 working days before the event (when possible, as it depends on the type of the meeting) providing information on responsibilities, level of involvement, especially if participants will be engaged in the discussion or they will be questioned about their work
- Share the objective(s) and the purpose(s) of the meeting in advance
- Be clear on whom should join and who is really needed
- Take always in consideration the persons/months partners have on the project and in your WP before planning the meetings. Meetings should be carried out when needed.
- Time limit: set the time in advance (e.g., no more than 2h)
- (For participants): confirm your participation to the meeting when possible and if your presence is considered 'necessary'. It helps the organizer to better plan the meeting
- (For participants): if your participation is important, try to avoid being late, as it might have consequences on the schedule of the meeting and on the other participants' schedules (5mins are accepted, more could be problematic). If you will be late, inform the organizer so the meeting can start without you.

Key takeaways:

- Be sure that the meeting is necessary and useful
- Plan the meeting following the working times of the different countries involved
- Send the invitation and the agenda at least 5 days before

ETHICS GUIDELINES

LINKS

During:

- Try to be always constructive in the discussion and be opened to constructive feedback from the others
- Address sensitive/personal issues bi-laterally, not in group meetings
- Try to focus on the topic of the meeting, without deviations that could affect the agenda
- Plan the breaks to be sure they are enough to restore before be engaged in a further discussion (one break of 10-15 mins if possible, every 45 mins)
- Avoid questioning other partners' skills / knowledge
- When planning activities, consider the different skills of the partners and how to involve them
- General remark: collaborate to maintain a good atmosphere in meetings and in the project
- In person meetings: give always an option for who cannot attend in person
- Tone: work in a friendly environment (professional criticism versus personal and/or referring to underperforming).
- (For meeting moderators): manage the time and avoid overstepping the duration of the meeting. If the meeting will run over the allotted time, please make it clear to participants that they are not obligated to stay if it is not possible for them before continuing.

Key takeaways:

- Be constructive, and try to focus only on the topic of the meeting
- Collaborate to maintain a good atmosphere

After:

- Always provide the minutes of the meeting (when relevant - depends on the typology of the meeting. Some meetings are more productive than others) where you define the further steps and to summarise the main decisions that have been taken. Important especially for partners who have internal follow-up meetings. Downside: too much time spent on writing minutes. Solution: Use action points/key messages.
- Share the decisions and set up follow-up meetings (to be communicated in advance)
- Try to provide answers to all questions left open in the meeting either in the minutes, future meetings or follow up conversations with relevant participants.
- Consider planning a restitution meeting (when relevant) where to explain the work progress and the decision-making process, and provide answers to the open questions
- Give time to 'digest' as group the decisions/changes and eventually consider to have a follow-up meeting

Key takeaways:

- After the meeting, it is necessary and useful to provide the minutes with the decisions taken

ETHICS GUIDELINES

LINKS

TO PROVIDE THE RIGHT COMMUNICATION

Outside the consortium:

- If you share images and/or contents related to public deliverables produced by other partners, be sure to inform them that you will be using/presenting their work.
- When possible, avoid sharing personal information if not officially authorized (e.g., picture, name or other sensitive information)
- Always check the content with the partners potentially involved or referred to in the post
- Please ask all the involved participants/speakers if you can tag them AND related institutions
- Do your best to make your posts accessible for different groups of people (see guidelines on accessibility in communication and diversity awareness)
- Events: images/information about results, products can be shared
- When referring to other partners' results and findings make sure to credit the author and to agree upon the content, unless you are presenting a new analysis

Key takeaways:
- Guarantee that the contents and materials are suitable for sharing
- Follow the accessibility rules for your materials

Social media post:

- Contents should be reviewed by communication experts to make sure they are delivered in the best possible way
- Social Media channels are managed by DEM responsible or communication lead
- Contents should always come from the partners/researchers
- Collaboration from and between partners/researchers is required for a smooth process
- Communication lead should plan ahead and agree with partners how many posts are needed (period shall be agreed upon with the partners)
- When possible, partners are encouraged to write in their native language

Key takeaways:
- Create a social media post plan and verify the contents with the partners before the sharing
- Use both English and native language

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