D1.2 Project Handbook

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Internal Reviewer	Nina van der Vaart, NFE

Version History

Version	Date	Author	Partner	Description
0.1	28.01.2019	Stefan Schürz	LFTL	1st draft
0.2	05.02.2019	Marijke Broekhuis	RRD	Addition RRD
0.3	07.02.2019	Stefan Schürz	LFTL	Add additions from YOU, NET, NFE
0.4	08.02.2019	Stefan Schürz	LFTL	Add additions from TERZ, MIRA
1.0	14.02.2019	Stefan Schürz	LFTL	Add additions to environmental analysis
3.0	19.02.2019	Stefan Schürz	LFTL	Ready for external release

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Summary

This project handbook describes the internal procedures of the SALSA consortium in terms of management plans and structures, communication and collaboration as well as quality control measures. The main target group for this deliverable are the consortium partners themselves as this handbook defines the project internal processes for securing high quality work to be performed across a set of complementary partner institutions. It serves as a reference document for all SALSA team members and may be especially helpful for individuals joining the project at a later stage.

Being a relatively large project with a set of diverse experts from different fields and backgrounds a core principle guiding internal processes is open participation and flexibility. Transparency about the project status, individual partner's ambitions as well as risk recognition and mitigation are additional principles that the project partners are committed to.

Still, in order to effectively operate in a big distributed team, we have defined some procedures of how to best communicate and structure our collaboration. Regular meetings are held via videoconferences as well as face-to-face. Communication is also strongly taking place via mail and the project mailing list. The main tool for sharing and collaborating on documents is a GSuite Drive folder.

The consortium is committed to produce high quality outputs and deliverables and therefore quality control is important. Quality guidelines describe the internal peer review process, which is applied to all project deliverables.

The general principles for the project execution are defined in the Description of Work (DoW), national Grant Agreements (GA) and the Consortium Agreement (CA). The project handbook does not replace any of these established documents, nor does it replace any of the EU guidelines for project implementation and documentation. When other sources of information exist, this document provides references to these sources to not duplicate information. Future versions of this handbook will be refined on the basis of specific project requirements and the feedback of project partners.

1 Contacts

Partner	Name	Email	Phone
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2 Project objectives

SALSA builds a smart, app-based-solution that optionally includes sensor technology to support physiotherapy and all aspects of starting and maintaining an active lifestyle for older adults - age 55+ - with or without the supervision of a physiotherapist.

The project objectives are described in detail in the SALSA DoW. They can be summarized as follows:

- SALSA specifically targets at seniors in terms of design, functionality and content underpinned by gamification elements which boost motivation and adherence.
- SALSA offers comprehensive social community and scheduling functions, which increase motivation, connection and community building.
- SALSA offers content that appeals to users of all fitness levels which ensures personalisation and adaptability.
- SALSA integrates sensors that allow an in-depth evaluation of movements for feedback used in video exercises and exergames.
- SALSA offers special functionalities for therapeutic use that deliver more information about the client's state, which leads to an increase of quality of treatment.
- SALSA provides a tool for physiotherapists to tailor the exercises for their clients, adapt, add content and get access to the log data for evaluation.
- SALSA offers clinically evidenced games/exercises and successful solutions.

The project objectives as described in the DoW are ambitious, although the consortium described a clearly defined strategy to achieve these goals, there is no ready-made answer to how exactly the objectives can be met. The tactics to achieve the superordinate project goals will, in all probability, need reconsideration and redesign during the project on the basis of user and stakeholder requirements in form of an agile market driven approach. The key performance indicators as described in the DoW give a clear vision on the quantities, qualitative and economic success of the project in relation to the stated objectives.

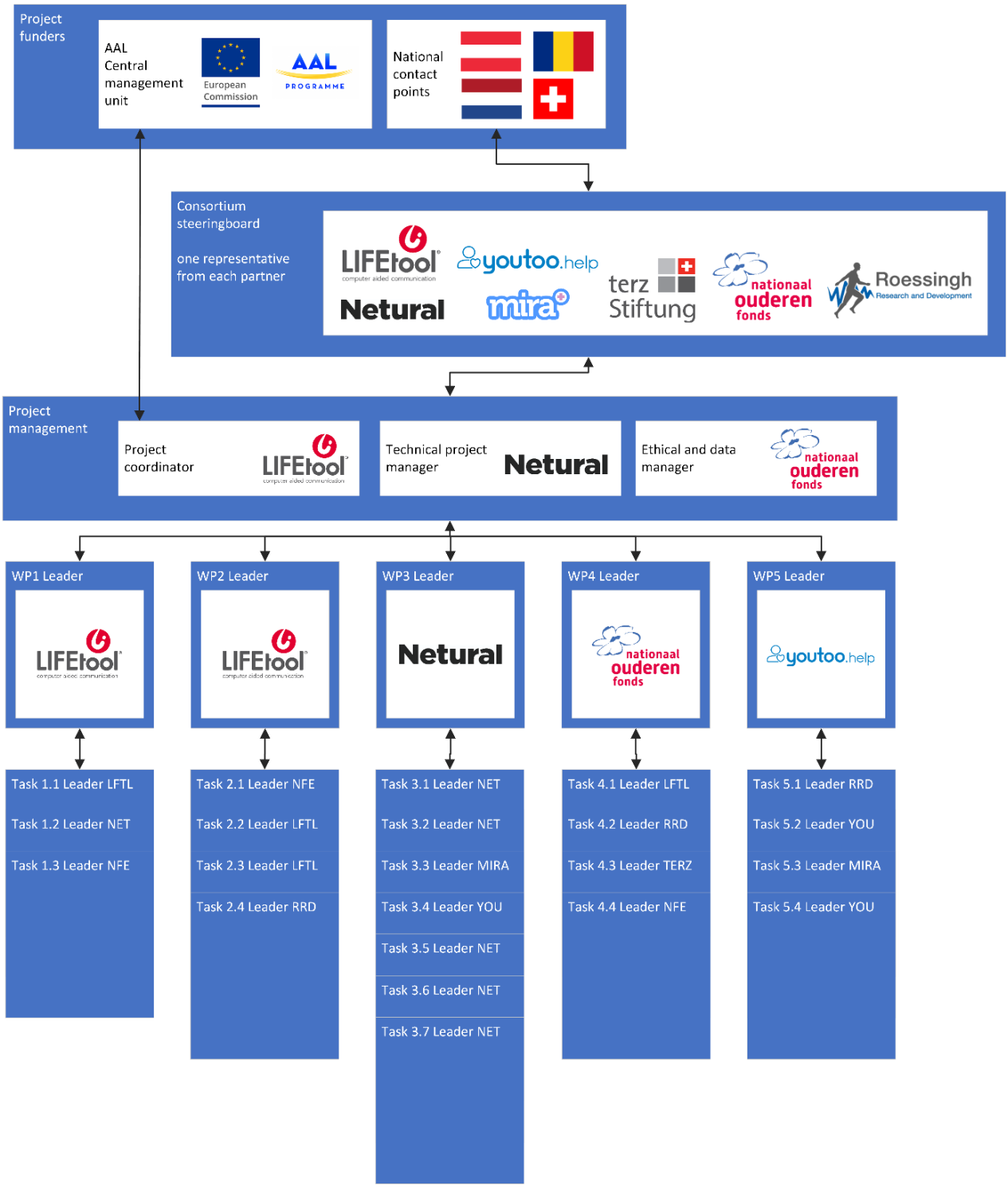
3 Project structure plan

Figure 1 - SALSA project structure plan

4 Project organisation

The project organizational structure is represented in the following figure:

Figure 2 - Project organisation structure diagram



The project organizational structure has multiple layers of decision-making:

Consortium steering board (SB): One representative from each partner organisation constitutes the SB. The SB implements the collective responsibility of all project partners and the ultimate level of decision (see CA). The SB is responsible for the overall implementation of the project and the coordination of deliverables, reports, work plans and resources. The SB meets regularly and works continuously between the meetings via mail and online meetings. All partners have direct contact with their NCPs.

Table 1 - Consortium steering board representatives

Partner	Steering board representative
LFTL	Stefan Schürz
NET	Gernot Bernkopf
YOU	Michael Matzner
MIRA	Alina Călin
NFE	Nina van der Vaart
RRD	Lex van Velsen
TERZ	Julia Nuss

The overall project management team includes the **project coordinator (PC)**, the **technical project manager (TPM)** and the **ethical and data manager (EDM).** Project coordinator of SALSA is Stefan Schürz (LFTL), technical project manager is Gernot Bernkopf (NET), ethical and data manager is Nina van der Vaart (NFE). Together they manage and oversee the entire project activities.

The PC's responsibilities include:

- coordinate and monitor the project in order to meet the objectives
- act as the official contact to the AAL Central Management Unit (CMU)
- ensure project compliance with all rules and regulations
- act as chairperson of the steering board

The TPM's responsibilities include:

- manage and monitor the overall technical implementation of the project
- perform daily operation of the testing environment
- keep a technology watch to react timely upon scientific and technological advances
- ensure the sustainability of the results from a technical perspective after the end of the project

The EDM's responsibilities include:

- ensure that ethical and privacy issues are properly addressed throughout all project activities
- ensure collected data is handled carefully accordingly to the requirements of the GDPR
- define guiding principles and main procedures regarding privacy, data protection, legal issues and ethical challenges

For every work package (WP), a specific person from the WP leading organisation is assigned to be the **WP leader (WPL)**.

The WPL's responsibilities include:

- coordinate the collaborative work of task leaders
- monitor WP progress, objectives, risks and milestones

Table 2 - WP leader assignment

WP	Title	Leader	Partner
1	Project management	Stefan Schürz	LFTL
2	End-user involvement, Software concept & Interaction design	Michael Gstöttenbauer	LFTL
3	Implementation & Integration	Gernot Bernkopf	NET
4	Evaluation & Impact Assessment	Nina van der Vaart	NFE
5	Business Model, Exploitation & Dissemination	Michael Matzner	YOU

For every task within a WP, a specific person from the task leading organisation is assigned to be the **task leader (TL).**

The TL's responsibilities include:

- coordinate the collaborative work with all participating partners in the task
- lead deliverables of the task (editorship)
- coordinate the work with other TLs of related tasks
- monitor task progress, objectives, risks and milestones
- communicate regularly with their WPL

Table 3 - Task leader assignment

Task	Title	Leader	Partner
1.1	Administrative and overall coordination	Stefan Schürz	LFTL
1.2	Technical project coordination	Gernot Bernkopf	NET
1.3	Ethical and data management	Nina van der Vaart	NFE
2.1	Analysis of user needs, existing solutions & concepts	Nina van der Vaart	NFE
2.2	Development of software concept	Michael Gstöttenbauer	LFTL
2.3	Creation of interaction design and usability concept	Michael Gstöttenbauer	LFTL
2.4	User centred service model design	Marijke Broekhuis	RRD
3.1	Software architecture	Gernot Bernkopf	NET
3.2	Development of graphic design	Evelyn Rendl	NET
3.3	Implementation of exergames with wearable sensors	Alina Călin	MIRA
3.4	Implementation of social community functionalities	Michaela Schönbauer	YOU
3.5	Implementation of video exercises with wearable sensors	Boris Beslic	NET
3.6	Implementation of the SALSA basic mobile app	Dominik Brandlberger	NET
3.7	System integration	Gernot Bernkopf	NET
4.1	User testing on pre-prototypes	Michael Gstöttenbauer	LFTL
4.2	Real-life evaluation protocol	Marit Dekker-van Weering	RRD
4.3	Real-life evaluation data collection	Julia Nuss	TERZ
4.2	Real-life evaluation data analysis reporting	Nina van der Vaart	NFE
5.1	Service model design set up	Marijke Broekhuis	RRD
5.2	Business model design	Michael Matzner	YOU
5.3	IPR and licensing	Alina Călin	MIRA
5.4	Dissemination and marketing material	Michael Matzner	YOU

5 Communication

Effective communication and knowledge management are essential key factors for the success of the SALSA project. With 7 partners and diverse fields of activities, the project is very complex. In order to coordinate all activities and objectives, the project management relies on three major strands of communication and knowledge management:

- **Face-to-face meetings**

With regards to the geographical distribution of partners plenary F2F meetings are used with care in order to minimise travel costs and effort. A total of 6 plenary F2F meetings are foreseen, including the project kick-off and project closure meeting. Plenary F2F meetings are organised to verify milestones and discuss essential decisions in person.

- **Online meetings**

Plenary online meetings are held once a month to ensure internal communication among partners, allow the WP leaders to coordinate the various tasks, and report the progress of work to all team members.

All meetings are recorded and made accessible to all partners, for complementation of notes and to view at a later time. The recording is available in the shared GSuite Drive folder, together with the notes from the meeting.

In addition to the monthly plenary online meetings the CSB, WPL and TL may organise meetings with specific partners whenever they think it is necessary to get the work done. LFTL will provide an online meeting room by Zoom for that.

- **Email**

Emails of specific interest for all partners go to the SALSA mailing list, which includes various colleagues from all partners: salsa@lifetool.eu

Many people may be working on a number of different projects and are likely to receive numerous mails every day, therefore, a standard subject title is proposed. This helps to quickly recognise the project related mails. Project related mails should include in the subject title: [SALSA] followed by a more specific description of the subject, deadline for feedback or reply, see below an example:

Email subject: **[SALSA] Kick off meeting minutes, feedback till 22.02**

Furthermore, it is required to copy the coordinator (stefan.schuerz@lifetool.at) in most important mail communications.

- **Shared Folder**

A shared GSuite Drive folder was setup to act as repository for all working documents, deliverables, minutes and reports. The link to the shared folder for the SALSA team is: https://goo.gl/KQ8k4g

Every member of the consortium has access to the shared folder. In case of problems/need for a new account, please contact the PC.

6 Milestones

Table 4 - SALSA Milestones

Nr.	Milestone name	WP	Means of verification	Planned date	Actual date
1	Kick-off meeting completed	1	Protocol of kick-off meeting	M1 | 02-19	
2	Software concept defined	2	D2.2	M4 | 05-19	
3	Wireframe version ready	2	D2.3	M6 | 07-19	
4	Software specifications ready	2, 3	D3.1	M6 | 07-19	
5	Graphic design completed	2, 3	Interactive mockup version	M7 | 08-19	
6	Pre-prototype ready	3	D3.2	Iterative (M12-25) 01-20 => 02-21	
7	Service model ready	2, 3	D5.2	M16 | 05-20	
8	Mid-term review completed	1, 2, 3, 4, 5	D1.4	M18 | 07-20	
9	Ethical approval ready for pilot	1, 4	Ethical approval obtained by each pilot site	M20 | 09-20	
10	Pilot prototype ready	3	D3.3	M25 | 02-21	
11	Pilot completed	4	All data ready	M33 | 10-21	
12	Pilot results analysed	4	D4.3	M36 | 01-22	
13	IPR and licensing agreements ready	5	IPR & licensing agreements completed for exploitation	M34 | 11-21	
14	Business model completed	5	D5.5	M35 | 12-21	
15	Project completed	1	All activities finished, deliverables submitted	M36 | 01-22	

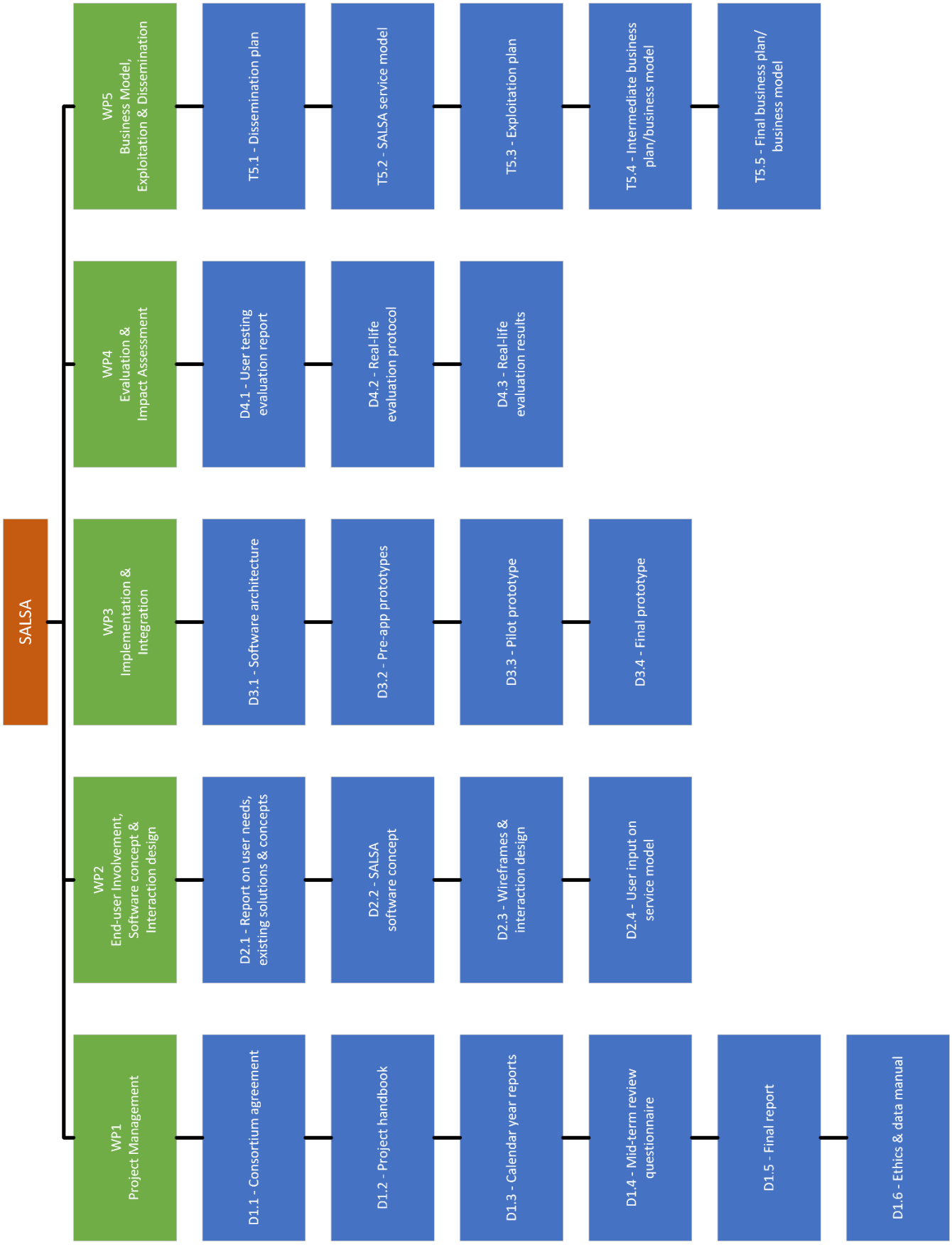
7 Deliverables

Most of the important project results are submitted to the CMU in the form of deliverables. Deliverables help to document and monitor the project's progress. Moreover, deliverables can also be regarded as an important tool for communication and collaboration in the project. Deliverables mark essential milestones in the project and make it possible that work in one specific area of the project can build on a stable basis of the results from another area of the project. Therefore, careful quality assurance of all deliverables is essential for the project success.

We distinguish three types of deliverables:

- Reports: written reports, e.g. concept descriptions, evaluation reports, progress reports, etc.
- Prototypes: software prototypes together with a written documentation
- Other: all deliverables other than the above mentioned, e.g. project website, dissemination materials, etc.

Figure 3 - SALSA deliverable plan



All deliverables undergo a thorough review process. In general, each deliverable is reviewed by one reviewing partner and by the PC.

Table 5 - SALSA Deliverables overview list and review schedule

Nr.	Deliverable name	Type	Dissemination level	Planned date	Reviewing partner	Actual date
1.1	Consortium agreement	Agreement	Restricted	M1 | 02-19	All	
1.2	Project handbook	Report	Public	M1 | 02-19	NFE	
1.3	Calendar year reports	Report	Restricted	After each calendar year	All	
1.4	Mid-term review questionnaire	Report	Restricted	M18 | 07-20	All	
1.5	Final report	Report	Restricted	2 months after project end | 03-22	All	
1.6	Ethics and data manual	Report	Public	M4 | 05-19	TERZ	
2.1	Report on user needs, existing solutions and concepts	Report	Public	M2 | 02-19	YOU	
2.2	SALSA software concept	Report	Restricted	M4 | 05-19	MIRA	
2.3	Wireframes and interaction design	Report	Restricted	M6 | 07-19	NFE	
2.4	User input on service model design	Report	Restricted	M12 | 01-20	NET	
3.1	Software architecture	Report	Restricted	M6 | 07-19	RRD	
3.2	Pre-app prototypes	Software	Restricted	Iterative (M12-25) 01-20 => 02-21	All	
3.3	Pilot prototype	Software	Restricted	M25 | 02-21	All	
3.4	Final prototype	Software	Public	M36 | 01-22	All	
4.1	User testing evaluation report	Report	Public	M25 | 02-21	YOU	
4.2	Real life evaluation protocol	Report	Restricted	M17 | 06-20	MIRA	
4.3	Real-life evaluation results	Report	Public	M36 | 01-22	RRD	
5.1	Dissemination plan	Report	Restricted	M6 | 07-19, M36 | 01-22	NFE	

5.2	SALSA service model	Report	Restricted	M16 | 05-20	TERZ	
5.3	Exploitation plan	Report	Restricted	M18 | 07-20	NFE	
5.4	Intermediate Business plan/ Business model	Report	Restricted	M18 | 07-20	RRD	
5.5	Final Business plan/ Business model	Report	Restricted	M35 | 12-21	MIRA	

The following table provides an overview of the stages and actions in the internal review process of SALSA deliverables. All dates/times are given in relation to the official submission due date (OSDD) as indicated in the list of deliverables in the DoW.

Table 6 - Stages of the internal review process for SALSA deliverables

Step	When? (time)	Who? (responsible)	What? (task)
1	<OSDD> - 4 weeks	TL (=author of deliverable)	Create complete draft => send to reviewing partner and PC
2	<OSDD> - 3 weeks	Reviewing partner	Provide review feedback => send back to TL and PC
3	<OSDD> - 2 weeks	TL	Include feedback, create final draft => send to PC
4	<OSDD> - 1 week	PC	Provide review feedback => send back to TL (if needed)
5	OSDD	PC	Give approval, submit to the CMU

8 Document standards and templates

Deliverables and presentations need to follow a consistent standard provided by the PC in form of Word and PowerPoint templates. These are saved in the shared folder for every team member to download.

Deliverable titles:

[SALSA_Dx.y_Title_vx.y] Example: SALSA_D1.1_Project handbook_v0.1

Use of version numbers:

- v0.1, v0.2, etc. Status = (first) draft
- v1.0 Status = ready for internal review (to be sent to reviewing partner)
- v1.1, v1.2, etc. Status = in case of adaptations are needed by author (after partner review)
- v2.1 Status = internal release (to be sent to PC for review)
- v2.1, v2.2 etc. Status = in case of adaptations are needed by author (after PC review)
- v3.0 Status = external release (to be released to the CMU)

Presentation titles:

[SALSA_Tx.y_Title_vx.y] Example: SALSA_T1.1_project administration_v.01

Use of version numbers:

- v0.1, v0.2, etc. Status = (first) draft
- v1.0 Status = ready for presentation

9 Project environment analysis

The project environment analysis is one method of analysing and evaluating the relations, expectations and influences of the project through internal and external social environments. The results of the analysis are used to derive the necessary activities for designing the environment relations. Designing the project environment relations is a project management task. It must be determined which environments are "relevant" for the project and significantly influence the project success. Relevant project environments can differ in internal and external project environments. External project environments are primarily interested in the project end result. Internal project environments are social environments that make a significant contribution in the course of the project and assume project roles within the project organisation. The relations between environments and the project can be evaluated and should be presented using symbols (e.g. +/-). Appropriate measures are derived for relation management of this evaluation.

Figure 4 - SALSA project environment graphic

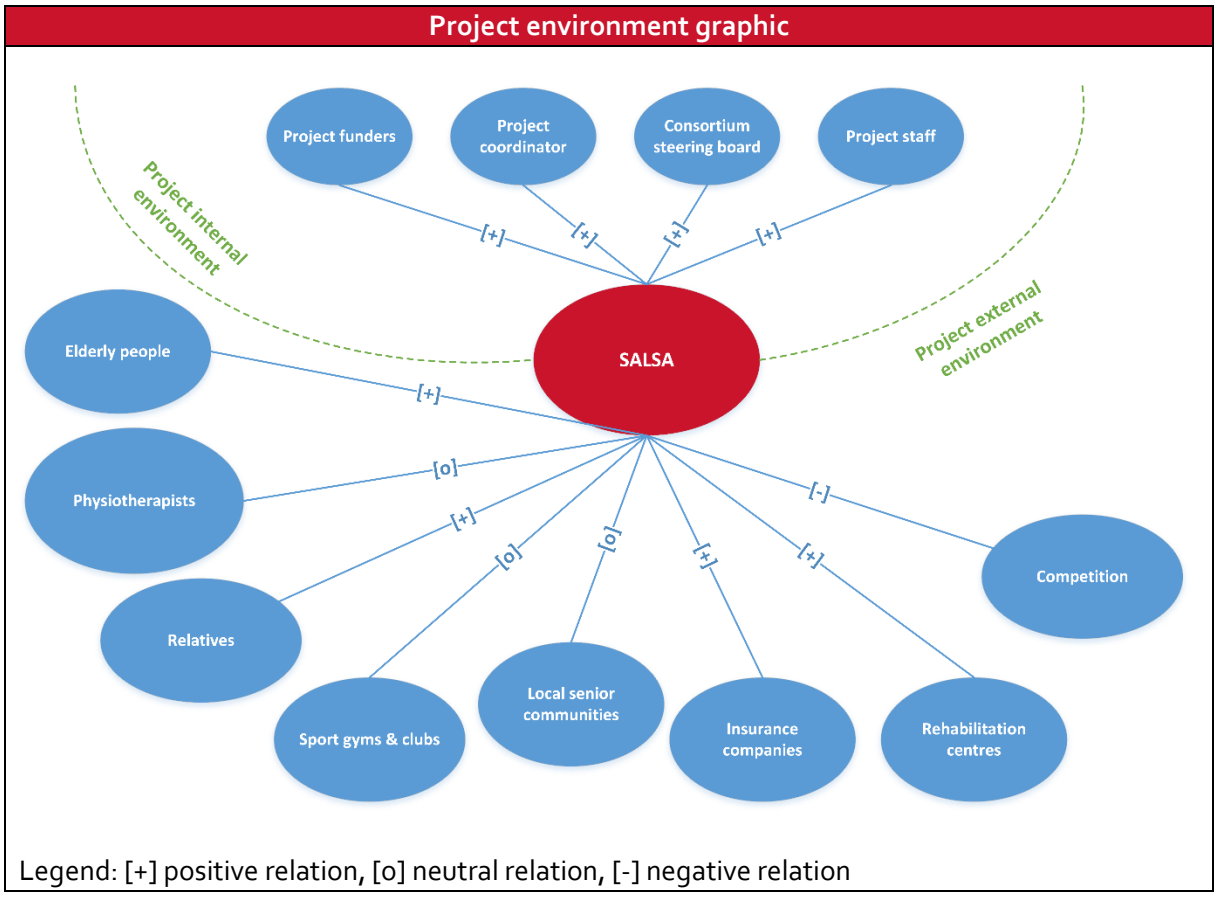


Table 7 - SALSA project environment relations

Project environment relations		
External environments	**Relation (potential/chance, conflict/risk)**	**Measures**
Elderly people	+ happy to have SALSA to get fit and maintain an active lifestyle	Involve them from the start, consider their needs
Physiotherapists	o maybe sceptical; difficult to estimate if they are openminded for SALSA	Involve them from the start, consider their needs; find key users which function as testimonials for others
Relatives	+ happy that their beloved ones have SALSA and stay active	Make sure that relatives know about SALSA
Sport gyms & clubs	o difficult to estimate if they are openminded for SALSA; maybe like the possibility to improve their services to for their clients	Involve them in service model design
Local senior communities	o difficult to estimate if they are openminded for SALSA; maybe like the possibility to improve their services to for their clients	Pilot partners get in contact with local senior communities, include them in service model design
Insurance companies	+ happy that their clients recover faster and stay healthy longer which reduces costs	Involve them in service model design, present them evidence that SALSA is providing benefits e.g. clinically evidence MIRA
Rehabilitation centres	+ happy that their clients have a tool which helps them to maintain their exercises after rehabilitation	Get in contact with rehabilitation centres to promote SALSA

10 Risk management and mitigation plans

A preliminary set of general risks on WP level together with mitigation plans is presented in the DoW. The process of risk identification, assessment and prevention as well as mitigation planning will be updated iteratively for each reporting period of the SALSA project. Risk identification will also be a key component of the monthly online plenary meetings. The input from each TL in terms of risks and mitigation plans will be collected by the PC and compiled into a central risk management sheet which is stored in the shared folder where all risks related to the project are handled. The link to the risk management sheet to download is: https://goo.gl/7bmHJ3

11 Key performance indicators

The success parameters of SALSA are defined through a set of performance indicators that give a clear vision on the quantities, qualitative and economic success for the project phase and that can be used to evaluate and monitor the project's progress in relation to the stated objectives. The deliverables will support these stated objectives through their specific content and will demonstrate the level of success defined in these parameters. The PC together with WPLs will take care of monitoring KPIs in different project phases.

Table 8 - SALSA Key performance indicators

WP	KPI	Measuring techniques / tools	Target value
1	Earned value management	Schedule variance, cost variance	≥ 0
2	User experience, mockup tests	User experience questionnaire	Good or above
3	Implementation progress	Sprint burndown charts	sprint backlog & done balance
3	Code coverage	SonarQube[1]	> 70-80%
3	Code quality	SonarQube, quality gate	Passed
3	App and application crashes	Crashlytics/Hockeyapp, app monitor	< 5%
4	Pilot users	Number of end users recruited in pilot phases	> 100
4	Quality of life	WHO Quality of life questionnaire	> 50% of users
4	Usability	System Usability Scale	> 68
4	Recommendation of SALSA	Recommendation rate (survey) e.g. Net promoter score (NPS)	> 50% of users
5	Willingness to Have (WitH) and to Pay (WtP)	User surveys	> 50% of users
5	Scientific publications	Number of accepted papers	> 3
5	Demonstrations of the SALSA solution in public exhibitions and events	Number attended demonstrations	> 5

[1] https://www.sonarqube.org/

12 Project progress reports

The project progress reports are written by the PC on a quarterly basis. They help to provide a documented history of the project.

Project progress report	
Report number:	**Reporting period:**
 ☐ **Project crisis** ☐ **Project in trouble** ☐ **Project in plan**	**Overall status:**
Status project objectives: •	Measurements: •
Status teamwork: •	Measurements: •
Necessary decisions: •	
Next steps: •	

13 Conclusions

This project handbook describes the main procedures of the SALSA project to operate successfully and effectively in order to achieve high quality project results. While this handbook is provided in the form of a report and deliverable it is a living document in the sense of being continuously updated by the PC. The processes described in here are implemented in the daily work of the consortium.

14 References

[1] Project Management Austria, https://www.pma.at/en/service/downloads

[2] SALSA Description of Work