

# REST@W

## REducing STress at Work

A European Strategic Alliance to manage with work-related stress issues

Principles and strategies to develop an effective management scheme with the cooperation of employers, workers and safety representatives in European SMEs system

# Project Management Handbook



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## Introduction

This document – Project Management Handbook (PMH) - is part of the Working Package n.1 (WP1 – Management) and details the management plan for the REST@W project, including some hints to the processes of communication, quality assurance and risk management mechanisms that will be put in place to ensure an effective coordination. The document's target audience is mainly the project's partners themselves, so that they have a clear but concise reference on the project's management aspects.

The consortium reserves the right to amend the Project Handbook Plan, and any related documentation, when it is necessary to implement changes in the quality and coordinating system.

This PMH is property of the consortium of partners involved in the REST@W Project and any other public issue to other parties is subject to approval by the management bodies of the project.

The development of a PMH across the consortium will ensure that the project runs to budget, time schedule and the quality of the deliverables meets the standards acceptable for all partners and the *Industrial relations and social dialogue* framework. In this process, some working groups organised (see tasks) and collaboration will form the basis for rich interactions and co-operation between team members and sub-groups.

In accordance with the Project Management Scheme (PMS) adopted by the project's Consortium to develop the activities over 18 months, the PMH contains a written collection of rules that will govern the work of the consortium and descriptions of key processes. It also outlines conflict resolution issues and reporting rules and processes. The PMH will be used to ensure that the roles, responsibilities, rights, and obligations of the partners are clearly defined, in order to promote productive work.

Particularly, the PMH includes:

- I. Basic references for the project management with the structure of PMS (administrative and financial strategies and rules; milestones; risk management);
- II. Partnership organization chart with the indication of the staff involved in the project, their functions (PMS) and the responsible for outputs / products / results;
- III. The operational work plan with step of monitoring; in particular as to outputs / products / results/milestones.

Through the PMH, consortium considers to handle a number of potential risks:

- **External:** they could be arose from the external environment, not wholly within the organization's control but where action can be taken to mitigate the risks
- **Operational:** relating to existing operations and activities –both current delivery and building and maintaining capacity and capability
- **Change:** risk created by decisions to pursue new endeavours.

## 1. REST@W aims and objectives

According to the REST@W project framework, partners will be involved in joint work for achieving FOUR specific and concrete objectives strictly referred to the main results (Handbook and Toolkit) and with the direct involvement of the STRATEGIC ALLIANCE MEMBERS.

Specific Objectives to pursue:

- I. To provide a CONTEMPORARY OVERVIEW about the implementation of the contents of the Agreement and the Framework Directive 89/391/EEC focusing on the roles of Strategic Alliance members in the SMEs system**
  - Identifying and measuring the current procedures and practice in action across the SMEs system that are relevant to the field of work-related stress management considering the different legislative approaches of each participating Country.
  - Reviewing the occupational roles and responsibilities performed by the Strategic Alliance members to manage with work-related stress issues.
  - Mapping and analysing the different approaches and strategies for the improvement of work-related stress conditions in SMEs system, with the effective participation of the members of the Strategic Alliance.
  
- II. To contribute to the development of NEW SOLUTIONS AND APPROACHES for Strategic Alliance members to manage with work-related stress issues across the SMEs system**
  - Identifying the critical conditions to the success of work-related stress management strategies within the SMEs system across participating Countries.
  - Describing the most relevant management practices and skills in action which provide the basis of effective work-related stress management.
  - Designing new skills and competencies across Strategic Alliance members to implement and develop an effective work-related management system at various levels in the SMEs for reducing additional costs in hiring external expertise for SMEs.
  
- III. To develop a systematic framework to improving the prevention and management of work-related stress phenomenon so that it is taken on board at the highest political level, including consideration of OSH concerns in NATIONAL DEVELOPMENT POLICIES within the participating countries**
  - Exploring the possible integration of the emerging and successful work-related stress competencies framework into existing within SMEs system across the participating Countries.

- Establishing conclusions and recommendations on the feasibility of: **a)**engaging employers, workers and representatives in management competencies for preventing and reducing stress at work **b)**applying common analysis strategies on response to work-related stress to each national context.
- Developing practical and good work-related stress management measures to be introduced and applied at enterprise level in accordance with EU and national action plan and legal framework.

**IV. To reinforce and increase A MORE GLOBAL KNOWLEDGE AND AWARENESS on work-related stress tools and good practices with the purpose of developing a systematic and sustainable approach to OSH in each participating Countries and in EU**

- Providing a technical Toolkit with proper and operational guidelines for Strategic Alliance members on how to manage; mitigate and prevent the work-related stress risks.
- Disseminating the Project results (Handbook and activities) in the wider community, with the involvement of the Consortium and the Strategic Alliance members' networks.
- Promoting the Projects activities through international seminars and events with the effective involvement of targets groups and relevant stakeholders.

## 2. Consortium

The composition of the Consortium is strictly referred to the references in the “**BUDGET HEADING 04.03.01.08 Industrial relations and social dialogue - Call Support for social dialogue 2015 - VP/2015/00**”. This project is a collaborative initiative between 13 organisations listed below:

NAME OF THE ORGANISATION	NUM.	ROLE	TASKS AND RESPONSIBILITIES	COUNTRY
Unione Italiana del Lavoro – UIL ITALIA	P1	Coordinator	<ul style="list-style-type: none"> <li>• Overall management and project coordination</li> </ul>	Italy
ITAL UIL	P2	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant taking care of the quality management.</li> <li>• Take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholders.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Join the Scientific Committee.</li> </ul>	Italy

			<ul style="list-style-type: none"> <li>• Provide the Scientific Committee with National data.</li> <li>• Disseminate the project results at national level.</li> </ul>	
<b>Fondazione Brodolini</b>	P3	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant;</li> <li>• Lead the Scientific Committee and WP Research and Analysis.</li> <li>• Assess the needs of the target group and draft a questionnaire to be spread at National level through national partners.</li> <li>• Evaluate the questionnaires received by national partners and draft a Handbook as specified in the Project Work Programme.</li> <li>• Take part to the National Focus Group (1 meeting along the project).</li> <li>• Participate to the international events.</li> <li>• Disseminate the project results at national level.</li> </ul>	Italy
<b>Confederazione Nazionale dell'artigianato e della Piccola e Media Impresa, CNA Servizi</b>	P4	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data.</li> <li>• Disseminate the project results at national level.</li> </ul>	Italy
<b>DIESIS COOP</b>	P5	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Being responsible of the Dissemination WP and relevant Dissemination Plan.</li> <li>• Participate to the international events.</li> <li>• Facilitate the participation of its national associated organizations to the National Focus Groups.</li> <li>• Join the Scientific Committee.</li> <li>• Disseminate the project results at European level.</li> </ul>	Belgium
<b>Unión General de Trabajadores – UGT ES</b>	P6	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> </ul>	Spain

			<ul style="list-style-type: none"> <li>• Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	
<b>Confederación Empresarial de Sociedades Laborales de España - CONFESAL</b>	P7	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	Spain
<b>Confédération générale des petites et moyennes entreprises - CGPME</b>	P8	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	France
<b>Magyar Szakszervezeti Szövetség - MaSZSZ</b>	P9	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> </ul>	Hungary



			<ul style="list-style-type: none"> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	
<b>Democratic League of Independent Trade Unions - LIGA</b>	P10	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	Hungary
<b>Munkástanácsok Országos Szövetsége - MOSz</b>	P11	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	Hungary
<b>Uniao General de Trabalhadores – UGT P</b>	P12	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> </ul>	Portugal

			<ul style="list-style-type: none"> <li>• Spread as much as possible the Project questionnaire through its network of Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	
LPS - SOLIDARUMAS	P13	Co-Applicant	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder.</li> <li>• Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data;</li> <li>• Disseminate the project results at national level.</li> </ul>	Lithuania
Confederația Națională a Sindicatelor Libere din România – CNSLR FRĂȚIA	P14	Associated Organizations	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>• Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder. Provide the Lead applicant with a report.</li> <li>• Participate to the international events.</li> <li>• Provide the Scientific Committee with National data.</li> <li>• Disseminate the project results at national level.</li> </ul>	Romania
European Trade Union Confederation - ETUC	P15	Associated Organizations	<ul style="list-style-type: none"> <li>• Coordinate all project activities with the Lead applicant.</li> <li>• Being active adviser of the Scientific Committee.</li> </ul>	Belgium

			<ul style="list-style-type: none"> <li>Facilitate the National associated organizations in defining objectives and methodologies.</li> <li>Participate to the international events.</li> <li>Disseminate the project results at European level.</li> </ul>	
<b>Force Ouvriere</b>	P16	Associated Organizations	<ul style="list-style-type: none"> <li>Coordinate all project activities with the Lead applicant.</li> <li>Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder. Provide the Lead applicant with a report.</li> <li>Participate to the international events.</li> <li>Provide the Scientific Committee with National data.</li> <li>Disseminate the project results at national level.</li> </ul>	France
<b>AFEOSZ COOP</b>	P17	Associated Organizations	<ul style="list-style-type: none"> <li>Coordinate all project activities with the Lead applicant.</li> <li>Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder. Provide the Lead applicant with a report.</li> <li>Participate to the international events.</li> <li>Provide the Scientific Committee with National data.</li> <li>Disseminate the project results at national level.</li> </ul>	Hungary
<b>INE GSEE</b>	P18	Associated Organizations	<ul style="list-style-type: none"> <li>Coordinate all project activities with the Lead applicant.</li> <li>Spread as much as possible the Project questionnaire through its network of workers, REPS and Employers (100-200 questionnaires).</li> <li>Organize and to take part to the National Focus Group (1 meeting along the project) involving representatives from workers, REPS, employers and any interested stakeholder. Provide the Lead applicant with a report.</li> <li>Participate to the international events.</li> <li>Provide the Scientific Committee with National data.</li> <li>Disseminate the project results at national level.</li> </ul>	Greece

UIL ITALIA represents the partnership as the signatory organisation with EC and shares roles and responsibilities with the other co-applicant and associated organisations of the Consortium through proper Mandate letters. The number of the Grant Agreement is 2014 - 3052 / 001 - 001, having the acronym "REST@W". The responsibilities of the various parts of the management structure are described below.

In accordance with the *BUDGET HEADING 04.03.01.08 - Industrial relations and social dialogue - CALL FOR PROPOSALS - Support for social dialogue 2015 VP/2015/001* references and with the *Financial Guidelines for Applicants* we highlight that:

- The **lead applicant** must be a **social partner organisation** at European, national or regional level.
- If a social partner organisation representing workers is lead or co-applicant, the proposal must have **genuine involvement, i.e. as co-applicant or associate organisation, of a social partner organisation representing employers**.
- Proposals submitted by a national or regional social partner organisation must have **genuine involvement, i.e. as co-applicant or associate organisation, from a European-level social partner organisation**
  
- Where proposals are submitted by several applicants, one applicant must assume the role of lead-applicant and is called the "*coordinator*". The other organisations involved in the application are called "*co-applicants*". The coordinator is responsible for submitting the proposal and signing the grant agreement after having received all the required powers of attorney from co-applicants. Since co-beneficiaries will share the financial responsibility; the financial capacity of each co-applicant will be assessed against its share in the action's budget.
  
- **Associate organisations**  
Other organisations may only participate in the action as associate organisations where this serves the aim of the action, on a no-cost basis. These organisations will not be a party of the grant agreement concluded with the Commission.

### 3. Working methodology

The basic work plan and methodology will consist of the following 3 phases. Most phases will have an associated WP. The Project will be implemented through a results-based management framework linked to an incremental of plan-do-check-action. The main phases are:

- **WP – MANAGEMENT – QUALITY AND EVALUATION (WP1-WP2)**

The management of the project is structured in a general coordination carried out by UIL and it is referred to project management, general coordination, monitoring and evaluation of activities. UIL will always strive not only for completion of set project objectives, but also for optimising the allocation and integration of the inputs necessary to meet these objectives across the entire Project lifetime: initiation; planning; executing; controlling and closing. Each partner will appoint some members to carry on activities and monitoring the work and the progress in accordance with the PMS and research timetable. In this phase, ITAL (IT) assisted by Monitoring Unit will be involved in ensuring that all relevant to the project are organised and evaluated at a high level of effectiveness and quality.

- **WP - IMPLEMENTATION (RESEARCH-ANALYSIS) – (WP3)**

This WP aims to achieve the objectives providing an extensive investigation (quantitative and qualitative approach) to define the contents for the final comparative Handbook and Toolkit. The research activities will be coordinated by FB with the support of the Scientific Committee (SC) across the participating Countries structured in four phases. In the first phase, SC will prepare a detailed research plan with proper methodological guidelines and instruments to follow by each partner during the national research activities with Strategic Alliance members and stakeholders. The second phase will be concerned an extensive overview of the existing documentation and the studies already carried out in the field exploring the current implementation of “Framework Agreement” (2004) and the Framework Directive 89/391/EEC” with an emphasis on the SMEs system and the role of Strategic Alliance members. During the third and fourth phase, thanks to the instruments provided in the first one, partners will be committed to carry on a deeper and detailed analysis through questionnaires and national focus groups with the direct involvement of Strategic Alliance Members and relevant stakeholders (for i.e.: Technical experts appointed by employers for Protective and Preventive services; Occupational Physician; OHS practitioners and experts etc.). Each partner will report the results/data to SC, which will elaborate and finalise them into the official Handbook’s sections (coordinated by FB) and Toolkit (coordinated by DIESIS).

- **WP – DISSEMINATION AND EXPLOITATION (WP4 – WP5)**

This WP aims to design a dissemination plan drafted by DIESIS that will operate at two levels (a) to promote the experiences, strategy and progress of the project and (b) the results and impacts. It will be conceived as a planned process of providing information on the quality, relevance and effectiveness of the results of programmes and initiatives to two key actors: (i) the participating organisations (horizontal approach) and (ii) external audiences, at the national partner context and OHS community level (vertical approach).The plan will describe the main activities as follows:

- Three International Seminars and a Final Conference to promote the activities and the results
- An innovative web area to disseminate the Project contents and make available the results
- The engagement of national and EU governments and parliaments to present the results and the concerns of the Strategic Alliance members

The exploitation strategy, coordinated by UIL, will be articulated in two levels: (a) by single partners through their national networks and (b) by the consortium as a whole through the follow up of the adequate results achieved. To reinforce the strategy adopted, a follow-up meeting among the partners will be arranged at the end of the Project.

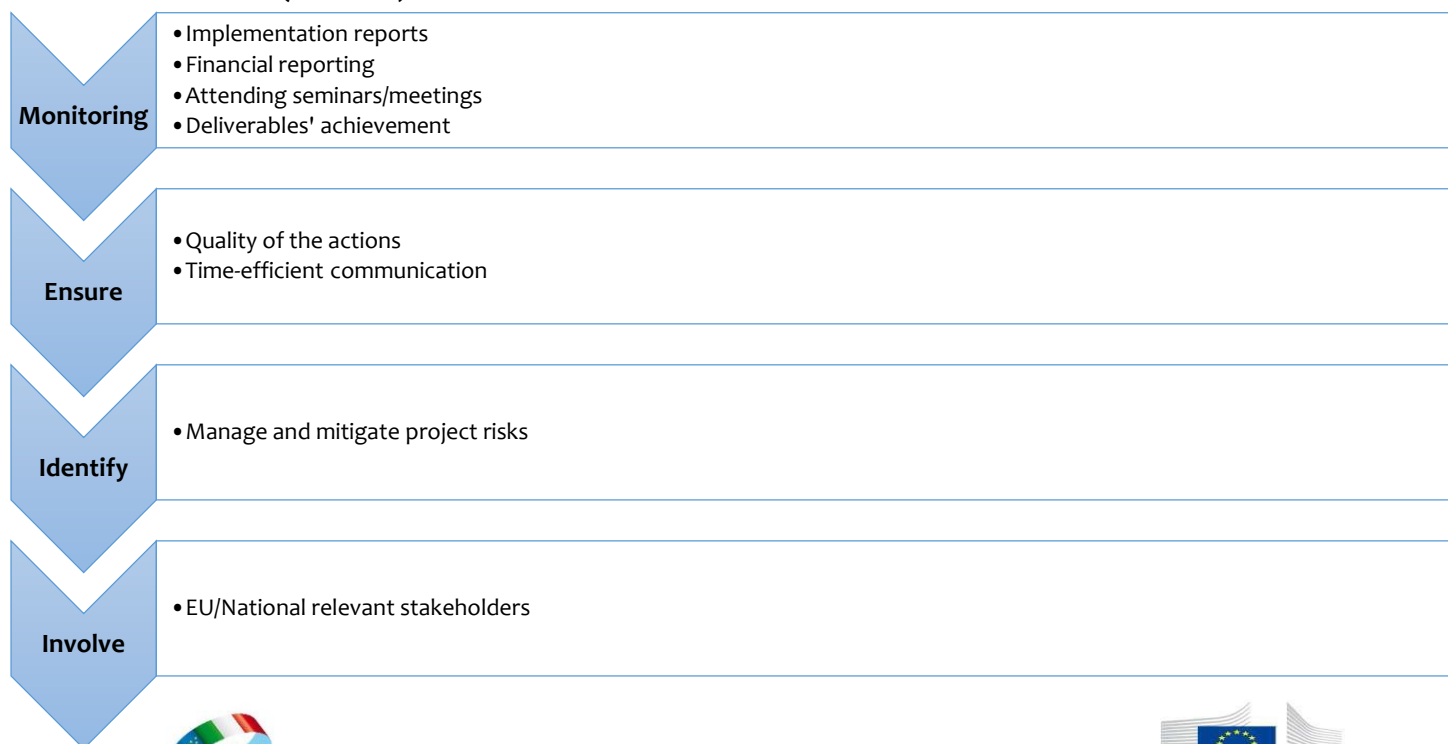
**Project's Milestones**

N.	Work Package/Main Tasks/Main Deliverables	Months																	
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
<b>1</b>	<b>Management</b>																		
	1.1 Project Management Handbook	M																	
	1.2 Internal Communication Plan	M																	
	1.3 International Steering Committee Meetings	M				M				M			M					M	
	1.4 Final Report																		M
<b>2</b>	<b>Quality and Evaluation</b>																		
	2.1 Quality Evaluation Plan	M																	
	2.2 Monitoring Reports		M																
	2.3 Final Evaluation Report																		M
<b>3</b>	<b>Implementation (Research and Analysis)</b>																		
	3.1 Secondary Analysis		→																
	3.2 First Section of Handbook					M													
	3.3 Purposive sample design survey								→										
	3.4 Second Section of Handbook									M									
	3.5 Key witness design survey (Focus Groups)												→						
	3.6 Third Section of Handbook													M					
	3.7 Collection and analysis of the data and information																	→	
	3.8 Final Handbook																		M
	3.9 Toolkit																		M
<b>4</b>	<b>Dissemination and Promotion</b>																		
	4.1 Dissemination and Promotion Plan				M														
	4.2 Newsletters			M							M								M
	4.4 International Seminars					M				M			M						M
<b>5</b>	<b>Exploitation</b>																		
	9.1 Exploitation Plan			M															

## 4. Overall project implementation

A coherent **Project Management Scheme (PMS)**, defined at the kick off meeting, is required in light of the number of participants, the objectives and the tight period of the Project. PMS is a coordination scheme designed to ensure effective and efficient management and sustainability at the project level; the achievement of work programme objectives within the stated time and resource limits; the establishment of the roles with the quantifiable and accurate measurement criteria of project progress; the **implementation of HIGH-QUALITY MONITORING PROCEDURES** and compliance in accordance with the reporting requirements outlined in the Contractual Agreement. Project implementation will be carefully planned, managed and monitored by UIL; it will ensure that project will succeed in achieving what it set out to do. UIL will take care of all relevant aspects of Project management including financial management and reporting to EU authorities. According to the PMS, UIL will be supported during the Project activities through a MULTI-LEVEL WORKING GROUPS APPROACH:

### 1) Management and Administrative Level (WP1-WP2)



## 2) Scientific and Research Level (WP3)

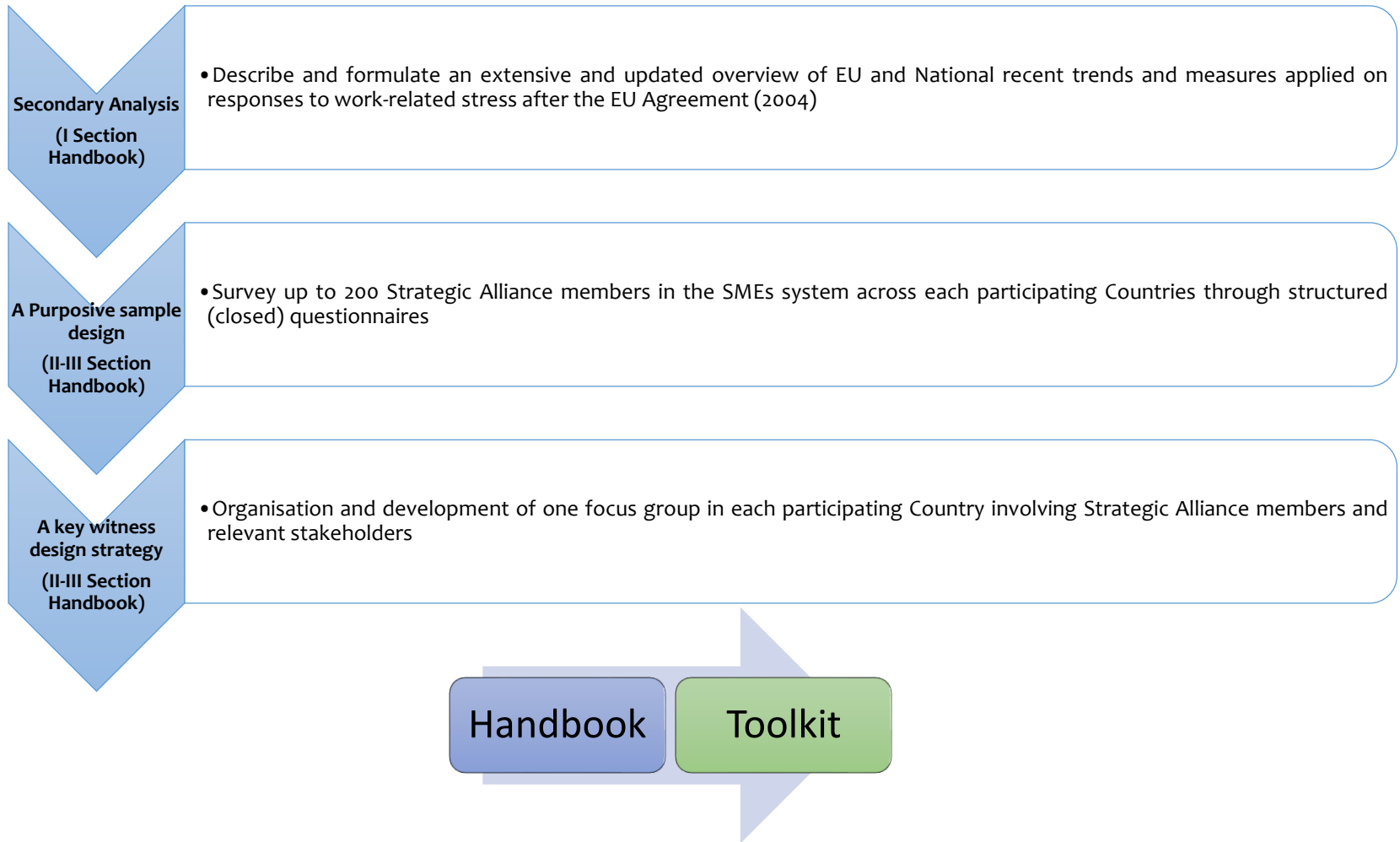
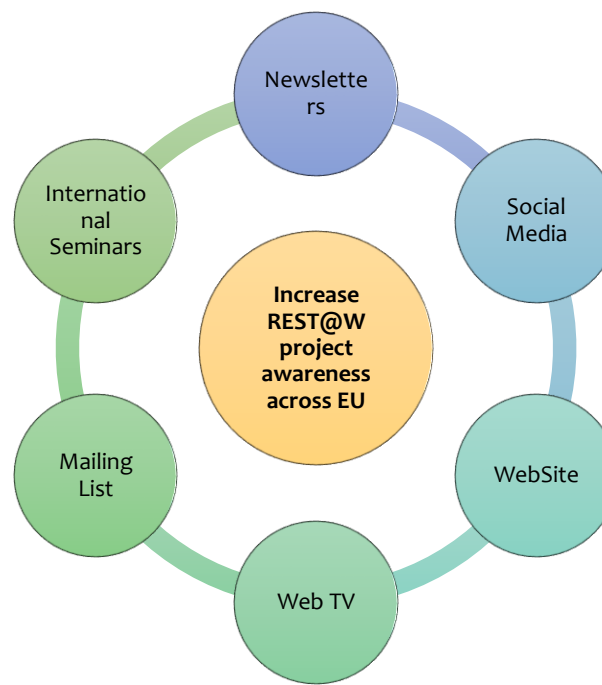




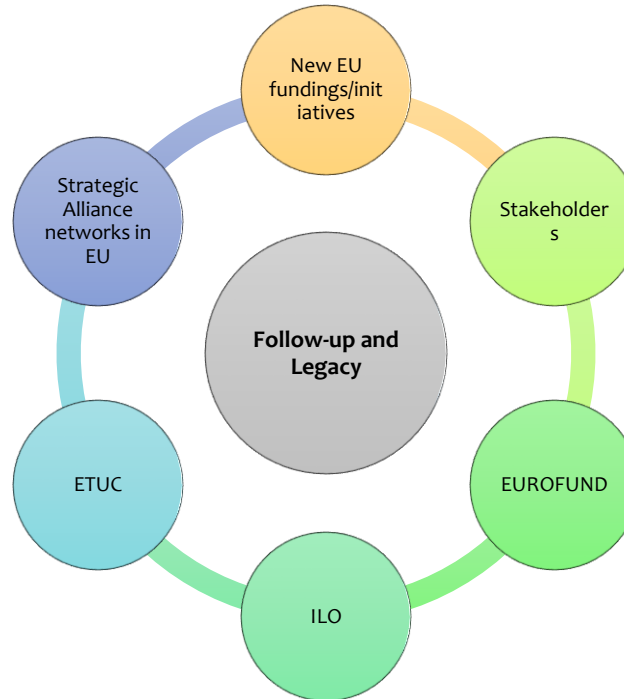
Fig.1 - Main Actors of the RST@W project Research and Analysis



3) Dissemination and Promotion (WP4)



4) Exploitation (WP5)



## 5. Strategic working groups

The main management and implementation bodies (*strategic working groups*) of the REST@W project are 4, which will be interacting in the whole process of implementation of the project, each with its own specific function.

- **International Steering Committee (ISC)**

It is composed of the project coordinator for each participating organisation (18 totally) and will be coordinated by UIL. It will be involved for all the Project lifetime across each WP with the responsibilities to manage and monitoring the general direction of the Project across EU, that the project is effectively delivered on time, to budget and to the required quality standard and with the effective involvement of Strategic Alliance members working in the SMEs system for the research initiatives. ISC will facilitate SC in providing the phases of the research and in creating multi-stakeholder networks, ensuring the involvement of relevant national policy departments concerning OHS. Each members of ISC will attend the four ISC meetings, the final conference and three-skype meetings.

**International Steering Committee - ISC**

COUNTRY	ORGANISATION	TYPE
IT	Unione Italiana del Lavoro – UIL ITALIA	Trade Union Organisation
IT	ITAL UIL	Patronato
IT	Fondazione Brodolini	Foundation
IT	Confederazione Nazionale dell'artigianato e della Piccola e Media Impresa, CNA Servizi	Employers' Organisation
BE	DIESIS COOP	NGO
ES	Unión General de Trabajadores - UGT	Trade Union Organisation
ES	Confederación Empresarial de Sociedades Laborales de España - CONFESAL	Employers' Organisation

FR	Confédération générale des petites et moyennes entreprises - CGPME	SME's Employers' Organization
HU	Magyar Szakszervezeti Szövetség - MaSZSZ	Trade Union Organisation
HU	Democratic League of Independent Trade Unions - LIGA	Trade Union Organisation
HU	Munkástanácsok Országos Szövetsége - MOSz	Trade Union Organisation
PT	Uniao General de Trabalhadores – UGT P	Trade Union Organisation
LT	SOLIDARUMAS - LPS	Trade Union Organisation
RO	Confederația Națională a Sindicatelor Libere din România – CNSLR FRĂȚIA	Trade Union Organisation
BE	European Trade Union Confederation - ETUC	Trade Union Organisation
FR	Force Ouvriere	Trade Union Organisation
HU	AFEOSZ COOP	SME's Employers' Organization
EL	INE GSEE	Trade Union Organisation

ISC will be actively involved in 5 International Steering Committee meetings scheduled as below. The ISC meeting will be scheduled as a half-day event connected with the other promotion events to optimise the Consortium's resources.

### ISC Meeting

ISC Meeting	Event	Period	Place
1 <sup>st</sup> ISC Meeting	Kick Off Meeting	January 2016	Rome
2 <sup>nd</sup> half/day ISC Meeting	1 <sup>st</sup> International Seminar	May 2016	Budapest
3 <sup>rd</sup> half/day ISC Meeting	International Seminar	September 2016	Madrid
4 <sup>th</sup> half/day ISC Meeting	International Seminar	December 2016	Paris
5 <sup>th</sup> half/day Follow-up ISC meeting	Final Internal Conference	April 2017	Rome

- **Monitoring Unit (M.U)**

M.U are composed of member of each partner (18 members). The M.U. takes care of the development of the project and supports ITAL through the activities described above. Particularly, all along the development of the project, the M.U. provides for a) the submission of questionnaires and checklist to partnerships b) customer satisfaction's evaluation through questionnaires to target groups and stakeholders. The M.U provides for drafting forms and templates for the control and monitoring of the project. ITAL (IT) takes care for collecting all monitoring and evaluation documents from M.U, synthesizing them in the final report.

### Monitoring Unit (MU)

COUNTRY	ORGANISATION	TYPE
IT	Unione Italiana del Lavoro – UIL ITALIA	Trade Union Organisation
IT	ITAL UIL	Patronato
IT	Fondazione Brodolini	Foundation
IT	Confederazione Nazionale dell'artigianato e della Piccola e Media Impresa, CNA Servizi	Employers' Organisation

BE	DIESIS COOP	NGO
ES	Unión General de Trabajadores - UGT	Trade Union Organisation
ES	Confederación Empresarial de Sociedades Laborales de España - CONFESAL	Employers' Organisation
FR	Confédération générale des petites et moyennes entreprises - CGPME	SME's Employers' Organization
HU	Magyar Szakszervezeti Szövetség - MaSZSZ	Trade Union Organisation
HU	Democratic League of Independent Trade Unions - LIGA	Trade Union Organisation
HU	Munkástanácsok Országos Szövetsége - MOSz	Trade Union Organisation
PT	Uniao General de Trabalhadores – UGT P	Trade Union Organisation
LT	SOLIDARUMAS - LPS	Trade Union Organisation
RO	Confederația Națională a Sindicatelor Libere din România – CNSLR FRĂȚIA	Trade Union Organisation
BE	European Trade Union Confederation - ETUC	Trade Union Organisation
FR	Force Ouvriere	Trade Union Organisation
HU	AFEOSZ COOP	SME's Employers' Organization
EL	INE GSEE	Trade Union Organisation

Monitoring Unit will be actively involved in partnership meetings; international seminars; final international conference and through skype meeting.

- **Scientific Committee (SC)**

It is composed of a key research expert of Fondazione Brodolini, UIL Italia, ETUC, DIESIS and ITAL and is coordinated by Fondazione Brodolini. It will be involved during the implementation phase (WP3 - research and analysis) to describe and analyse the contents and results for the final comparative Handbook and Toolkit.

**Scientific Committee (SC)**

COUNTRY	ORGANISATION	ROLE
IT	Fondazione Brodolini (FB)	LEADER
IT	UIL ITALIA	Member
BE	DIESIS	Member
IT	ITAL	Member
BE	ETUC	Member

## 6. International seminars

The International Seminars will be 4 (half day for each). They could be also arranged through on-line system/platform. The first one will be the kick-off meeting (Italy), the last one will coincide with the final international e-seminar in UK for dissemination and promotion (WP3), in order to optimize travel and subsistence costs. Furthermore, up to 1-2 people for staff per partner will travel and at maximum two days and the meetings have been reduced to the essential. The coordination meetings are organized get into a deeper discussion, to support team building and cooperation, they represent the core of the information and communication measures of the project.

### International Seminars Scheduled

International Seminar	Main Goals	Period	Place
<b>1<sup>st</sup> International Seminar</b>	Present, discuss and promote the First Section of the Handbook	May 2016	Budapest
<b>2<sup>nd</sup> International Seminar</b>	Present, discuss and promote the Second Section of the Handbook	September 2016	Madrid
<b>3<sup>rd</sup> International Seminar</b>	Present, discuss and promote the Third Section of the Handbook	December 2016	Paris
<b>Final Conference</b>	Present, discuss and promote the final version of the Handbook and Toolkit	April 2017	Rome

All the international seminars' results shall include as a minimum:

- Meeting minutes: agenda and summary of discussion
- Terms of references: summary of actions with associated roles and timetables for each work package
- List of attendees and questionnaires of satisfaction filled
- Date and venue of next meeting



## 7. Reporting

The financial and administrative procedures (timing, organisations and rules) will be organised and provided by each organisation partners (Coordinator + Co-applicant) in accordance with the rules written and described in the “FINANCIAL GUIDELINES FOR APPLICANTS” (2015), see also <http://ec.europa.eu/social/home.jsp?langId=en> .

The coordinator UIL ITALIA will lead the reporting and financial statement phases.

## 8. Communications

Managing project communications is all about the creation, collection, distribution, storage, and handy retrieval of project information. It is what the project coordinator will do day in and day out. The project coordinator is at the hub of communications and will work constantly with the project team, the working groups and the project target groups in order to share any communications about the project activities. The key element for a correct and effective communication between the Consortium and the external society, is to plan how and what to communicate and then sharing that plan and expectations at the launch of the project or of any other relevant initiative.

The “internal communication and cooperation plan”- of which P1 is responsible - collects and explains the communication processes, the acceptable modalities for any strategy of communication adopted, and the target group’s expectations against the communication approach. The plan should detail how information is gathered, organized, accessed, and provided. The plan should also provide a schedule of expected communication based on a calendar schedule, such as project meetings. Some communications can be prompted by external or internal conditions of the project or Consortium, such as cost variances, schedule variances, any deviations in outcomes from the initial plans, or other performance-related issues.

## 9. Quality assurance

The quality approach includes measures to be adopted for an internal and external evaluation of the project activities, results, etc. ITAL will be the lead-partner of WP2. The focal point of quality evaluation and control within the project will be the deliverables. At the early stage of the Project (kick-off meeting), the consortium will define the standards and quality indicators (OMI - Objective Measurable Indicators). The aims of this WP are to:

- evaluate project's relevance and efficiency;
- determine if project responds to main target groups' needs;

- measure project's results among participants;
- guarantee that the quality of the project processes and results meet the predetermined standards;
- contribute to developing the community of beneficiaries;
- evaluate the satisfaction of the participants in the international events.

Examples of evaluation and monitoring process adopted by the Project will consider the following KEY ISSUES:

- Approaches for promoting and facilitating the quality of mechanisms in relation to linkage, networking, coordination or integration of Strategic Alliance, SMEs system and participating Organisations.
- Approaches to ensure and measure activities during the Project realization, and after, as a part of project sustainability.
- Approaches to ensure and measure high quality activities and processes involving Strategic Alliance members and stakeholders.
- Approaches to measure and consider target groups and stakeholders satisfaction.

A proper Quality Evaluation Plan is drafted to manage with these activities.

## 10. Risk management and mitigation

Through the Project Management Handbook and the Quality Evaluation Plan Consortium considers to handle a number of potential risks:

- External: they could be arose from the external environment, not wholly within the organization's control but where action can be taken to mitigate the risks
- Operational: relating to existing operations and activities –both current delivery and building and maintaining capacity and capability
- Change: risk created by decisions to pursue new endeavours

Consortium will be involved in mitigating and managing with risks above, as follows:

#### A) Delays to project schedule

- The Project Management Handbook will include a project schedule detailing key milestones and reporting points throughout the project. This will clearly set out the whole project schedule and be agreed by all partners.
- Strong project management with systems embedded for regular monitoring and checks on progress.
- Flexible project management – quickly identifying any potential delays and responsively taking mitigating action.
- Identifying where delays to parts of phases of work will have impact on subsequent phases.
- Good scheduling and planning that takes into account the possibility of slippage, i.e. a realistic project schedule in which tasks are achievable and the time allotted to them realistic with hard and soft deadlines.

#### B) Partners not fulfilling tasks / not completing tasks to agreed quality standards

- Strong project management with systems embedded for regular monitoring and checks on progress.
- Good scheduling and planning that takes into account the possibility of slippage, i.e. a realistic project schedule in which tasks are achievable and the time allotted to them realistic with hard and soft deadlines.
- Collaborative partnership where partners are encouraged to flag up potential issues so that other partners are able to help and support where appropriate.
- Agreed quality standards and assessment processes at the outset.
- Partners with good track record of EU projects who understand the partnership commitment and have the capacity to, if necessary to support other partners.

#### C) Changes to staff

- Partner organisations either have good track record of successfully delivering EU / other transnational projects. They need sufficient internal capacity and an experienced multi-skilled team.
- Project responsibility and involvement shared across staff team so that if there are staff changes the project expertise is not lost.

**D) Budget changes/ issues**

- Budgets drawn up and managed by staff and organisations with significant expertise in EU projects. Therefore, these are realistic, manageable at the outset, and underpinned by sound financial management.
- That the financial support offered to partners is clear and accessible throughout the project – this will help ensure the early identification of any issues.

**E) Partner capacity (affects of changing organisational / national contexts)**

- Partners with good track record of EU projects who understand the partnership commitment and have the capacity to, if necessary to support other partners.
- Good partner communication with regular / ongoing liaison and progress updates / reporting points.

# ANNEXES

# I. GANTT

Name of the project:[REST@W Project]

PROJECT TIMETABLE																		
MONTHS	2015	2016												2017				
	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18
<b>Project activity*</b>																		
WP1-Management																		
WP2-Quality and Evaluation																		
WP3-Implementation (Research and Analysis)																		
WP4-Dissemination and Promotion																		
WP5-Exploitation																		
R1 - Secondary Analysis																		
R2 - Questionnaires																		
R3 - Focus Group																		
R4 - Collection and Analysis																		
Deliv.1 (Handbook - First Section)																		
Deliv.1 (Handbook - Second Section)																		
Deliv.1 (Handbook - Third Section)																		
Deliv.1 (Handbook - Final)																		
Deliv.2 (Toolkit)																		
E1 - Rome (Kick Off Meeting + 1st ISC Meeting)																		
E2 - Budapest (1st International Seminar + 2nd half/day ISC Meeting)																		
E3 - Madrid (2nd International Seminar + 3rd half/day ISC Meeting)																		
E4 - Paris (3rd International Seminar + 4th half/day ISC Meeting)																		
E5 - Rome (Final International Conference + half/day Follow-up ISC meeting)																		
SM1 - Skype Meeting																		
SM2 - Skype Meeting																		
SM3 - Skype Meeting																		
Newsletter																		
			1st							2nd								3rd

## Legenda

### \*Project activity types

WPn - Work Package

Rn - Research Activities

Deliv.n - Deliverable

En - International Events (Seminar + International Steering Committee)

SMn - Skype Meeting

n - number of the activity

## II. International meeting - Registration form

### REGISTRATION FORM **participants** FORMULAIRE D'INSCRIPTION

**Kick-off Meeting**

**Rome, 21/01/2016**

TO BE RETURN BY / A RENVOYER AVANT LE 04/01/2016.

**TO/A** Massimo Di Pietro, e-mail: m.dipietro@uil.it, Tel.: + 39/06/4753229

**CC :** Giovanni Casale, e-mail: bruxelles@uil.it, Tel.: + 32/(0)2/2183055

Please complete and send back all pages / Veuillez compléter et renvoyer tous les pages  
IN BLOCK CAPITALS / EN MAJUSCULES

#### 1. REGISTRATION/INSCRIPTION

<b>Surname Nom</b>	<input type="checkbox"/> Mr <input type="checkbox"/> Ms	
<b>First Name Prénom</b>		
<b>Function Fonction</b>		
<b>Organisation</b>		
<b>E-MAIL</b>	1)	
	2)	
<b>Full Address Adresse complète</b>		
<b>Tel. (+ international)</b>		



Fax (+ international)	
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THE **E-MAIL ADDRESS** HAS TO BE ABSOLUTELY **LEGIBLE** / VEUILLEZ À CE QUE **L'ADRESSE E-MAIL** SOIT **LISIBLE**.

## 2. HOTEL

Do you need accommodation?  YES - OUI

Avez-vous besoin d'un logement à l'hôtel?  NO - NON

If yes, which nights? Si oui, quelles nuits?

20/01 → 21/01

other (**not paid by UIL** and subject to availability in the hotel /**non pris en charge par la UIL** et sous réserve de la disponibilité dans l'hôtel)

Concerning hotel nights booked and paid by the UIL, please refer to the paragraph “Accommodation and travel policy” in the invitation.

Concernant les nuits d'hôtel réservées et payées par la UIL, veuillez vous référer au paragraphe “Règles de logement et de voyage” dans l'invitation.

## 3. REPAS / MEALS

- Vegetarian/végétarien?  YES - OUI  NO – NON
- Other special dietary requirements/Autre régime alimentaire particulier :

## 4. TRAVEL/VOYAGE

**Please make your own reservation**

Transport documents must be reserved by the participants and will be reimbursed **up to 400 euro** after the conference and after reception by post of the reimbursement form with the following documents (\*):

- All their plane boarding passes (outward and return journeys for each segment of the trip). Reimbursement on the basis of the economy class rate;
- The outward and return journey train e-ticket;
- The purchase invoices of the outward and return journeys, stating the costs of the ticket and order date.

**We regularly receive comments from the European Commission about travel costs that are too high, notably "full economy". We therefore ask participants to buy their tickets as soon as possible in order to benefit from the best price possible. The purchase should be made within a reasonable time following the announcement of the event. If this is not the case, we will be obliged to only reimburse the average cost of the economy class trips, as concerns the transport budgets of activities financed by the European Commission.**

Business or first class plane tickets will be refunded only on the average price of economy class.

Travel expenses by car will be refunded on the basis of a first class train rate. In order to be refunded, please:

- indicate the towns of departure and arrival and the price of a first class train rate;
- attach to the reimbursement form the information obtained via Internet or by your travel agency.

These measures are essential in order to justify reimbursement to the European Commission within the scope of the activities it finances.

**(\*) Without these documents, the UIL will not be able to reimburse your travel costs.**

**Taxis are not reimbursed.**

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### **Veillez effectuer la réservation de votre titre de transport**

Les titres de transport sont à réserver par les participants et seront remboursés **jusqu'à 400 euro** après la conférence, et après réception par courrier postal du formulaire de remboursement avec les documents suivants (\*):

- toutes les cartes d'embarquement (aller et retour de chaque segment du voyage) pour l'avion (remboursement sur base du tarif Economy);
- l'e-ticket de train aller et retour (sur base du tarif 1ère classe);
- la facture d'achat du billet aller et retour mentionnant le coût de ce billet et la date de commande.

**Nous recevons régulièrement de la part de la Commission européenne des remarques sur les coûts de voyage trop élevés, notamment les "full economy". Nous demandons donc aux participants d'acheter leurs billets le plus vite possible, afin de bénéficier des meilleurs tarifs économiques. L'achat devra dès lors se faire dans un délai raisonnable suivant l'annonce de l'événement. Si tel n'a pas été le cas, nous serons dans l'obligation, au regard des budgets transports des activités financées par la Commission Européenne, de ne rembourser que le coût moyen des voyages en classe économique.**

Les billets d'avion au tarif business ou 1ère ne seront remboursés qu'à concurrence du coût moyen des voyages en classe économique.

Les frais de voyage en voiture seront remboursés sur base du tarif 1ère classe en train.

Afin de recevoir le remboursement, veuillez :

- indiquer les villes de départ et d'arrivée et le tarif 1ère classe en train ;
- annexer au formulaire de remboursement l'information obtenue sur Internet ou de votre agence de voyage.

Ces mesures sont essentielles pour pouvoir justifier le remboursement auprès de la Commission européenne dans le cadre des activités financées par celle-ci.

**(\*) Sans ces documents, la UIL ne sera pas en capacité de vous rembourser vos frais de transports.**

**Les frais de taxi ne sont pas remboursés.**

**IMPORTANT : “Règles de logement et de voyage” - Veuillez lire attentivement ce qui suit:**

- Les frais de séjour (logement et repas organisés par la UIL) seront pris en charge par la UIL dans le cadre de ce projet.
- En cas de réservation d'un bloc de chambres par la UIL, les frais de chambres non attribuées sont considérés comme **non éligibles** par la Commission et sont systématiquement imputés au budget de la UIL.
- Pour nous aider à réduire ces frais **non éligibles**, nous vous prions de réserver votre chambre dans les temps mentionnés dans ce courrier et en utilisant le formulaire en annexe. Après cette date, les chambres non attribuées seront indisponibles via la UIL et le prix n'est plus garanti. Les collègues souhaitant encore s'inscrire devront se charger de leur réservation d'hôtel. Ils seront remboursés après l'événement, sur présentation de la facture et à concurrence maximale du prix négocié pour cet événement.
- Les frais de « **NO SHOW** », étant également **non éligibles**, ils seront facturés à l'organisation du participant ayant fait une réservation via la UIL mais ne s'étant pas présenté à l'hôtel.
- Tous les extra et dépenses personnelles sont à charge des participants.
- Les titres de transport sont à réserver par les participants et seront remboursés après la conférence. *Veuillez lire attentivement les informations relatives à l'achat et au remboursement des titres de transport indiquées dans la section Travel/Voyage du formulaire d'inscription.* »

**IMPORTANT: “Accommodation and travel policy” - Please read carefully:**

- The accommodation costs (room and meal organised by the UIL) will be covered by the UIL in the context of this project.

- In the case of a block booking done by the UIL, the costs for rooms remained empty are considered as **non-eligible** by the Commission, and are automatically charged to the UIL's budget.
- To help us reduce these **non-eligible** costs, please book your room by the deadline provided, using the enclosed form. After this date, any rooms not allocated will no longer be available via the UIL and the negotiated price is no more guaranteed. Colleagues who would still like to register must make their hotel bookings themselves. They will be refunded after the event on production of their invoice, up to a maximum value equivalent to the price negotiated for this event.
- **“NO SHOW” costs** are also **non-eligible** and they will be invoiced to the organisation of the participant who made the booking via the UIL but did not show up at the hotel.
- All extras and personal expenses are payable by the participants.
- Receipts for travels must be kept by the participants and will be refunded after the conference. *Please read the information about buying and refunding transport costs in the Travel/Voyage section of the registration form.”*

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This document reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.