

### Research and Innovation Action

## **Social Sciences & Humanities Open Cloud**

Project Number: 823782 Start Date of Project: 01/01/2019 Duration: 40 months

# Report on **Milestone 38**Launch Community Engagement Strategy

Dissemination Level	PU
Due Date of Milestone	31/07/19 (M7)
Actual Achievement Date	04/10/19
Lead Beneficiary/LTP	1.3 UL-FDV/ADP
Work Package	WP6 Fostering Communities, Empowering Users and & Building Expertise
Task	T6.2 Fostering Communities: Engaging New & Existing Users
Version	V1.1
Number of Pages	p.1 – p.22

#### **Abstract:**

This document describes the progress on carrying out the community engagement activities identified in the SSHOC Community Engagement Strategy (D6.1) under T6.2 and according to the means of verification as per the description of work.

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### 1. Introduction

This milestone concerns the launching of the community engagement strategy. Means of verification as defined in the SSHOC DoA are (a) planning of one awareness workshop for the Humanities, one for the Social Sciences and four cross-disciplinary, (b) a series of 6 webinars to update on specific services and to showcase practical use cases within the SSHOC infrastructure and (c) the preparation of information sheets (minimum of 8) promotion of awareness of SSHOC services.

The basis for the workshops, webinars and information sheets were set in D6.1 SSHOC Community engagement strategy (strategy on how to engage with stakeholders) and D2.1 SSHOC Overall Communication and Outreach Planning (eight primary stakeholder categories were identified).



FIGURE 1: SSHOC STAKEHOLDERS

Source: SSHOC D6.1, p.12



## 2. Description of the Milestone

### 2.1. Role of the Milestone

WP6 will engage and train stakeholders on the products and outputs of the SSHOC project. The goal of Task 6.2 itself is to ensure the broadest engagement of the SSHOC project with the target communities. This will be done through:

- A series of geographically distributed workshops addressing different target audiences (e.g. Data Producers, Data Users, Data Experts, "Non-savvy researchers", Librarians, Secure Data Facility Professionals but also policymakers and civil society), and disciplinary perspectives. A minimum of 6 workshops will be organized.
- A series of 6 awareness webinars, with the purpose of updating on specific services and showcasing practical use cases within the SSHOC infrastructure.
- The mid-project SSHOC Stakeholder Forum to showcase project progress and achievements and engage with a broader range of SSHOC stakeholders and other European initiatives.
- The SSHOC Final Conference.
- Building a relationship and consolidation across the ERICs members, project partners, the relevant existing networks of researchers, and European Research Libraries, and support for local engagement through information sheets and materials that can be adapted to the local context and will raise awareness on needs and solutions.

The work described in the milestone provided the basis for the execution of the planned events.

#### 2.2. Means of verification

The planning of events started with a detailed overview of the SSHOC Grant Agreement where we recognized potential products and services to be presented at the webinars and workshops. To have an even clearer view and also engage task leaders, Task 6.2 sent out an online survey (using 1ka.si tool / see Appendix 1.) at the beginning of September 2019.

In the survey we were particularly interested in the following: What products (tools, documents, software, reports etc.) do they plan to provide/develop within their tasks? When do they expect them to be ready to use? How do they plan to engage communities to help them develop better products? And how can Task 6.2 help them? The survey was divided into two parts, first asking about engagement activities defined in the grant agreement and second about actions that they find important in engaging with the SSHOC target communities for each work package/task but were not defined in detail.

About one third of task leads responded to the survey (for results see Appendix 5). Task 6.2 is planning to start analysing the first batch of survey responses mid-November and amend the proposed workshop and webinar planning (see Appendix 3) accordingly. Task 6.2 will follow up on the responses in November and after that it



will regularly monitor the project activities to identify further project developments that need engagement with SSHOC stakeholders and raising awareness about the products and services they produce. We shall encourage tasks to offer possibilities for the engagement of all stakeholders. Tasks that did not respond to the survey will be contacted to discuss their possible engagement and awareness raising activities. To ease the work of tasks through the whole project and support the planning and organization of engagement workshops and awareness-raising webinars, a partner from Task 6.2 has been assigned to a specific task, to communicate and follow developments (see Appendix 4). All communications and other useful findings will be written down in a task dedicated table (see example in Appendix 2). The survey serves as a starting point for planning T6.2 activities. Follow up interviews with the task leaders will provide more details.

To start the outreach and engagement activities and support the engagement with the project's stakeholders, two SSHOC posters (one general and one focusing on the project's training activities<sup>1</sup>) have already been developed together with some promotional materials (flyers and post-it notes). The post-it notes have specifically been produced to share information about the SSHOC Training Network and a call for action to join the SSHOC training community<sup>2</sup>.

All the planned engagement activities aim to engage with a wide range of stakeholders and receive feedback from them on various aspects of the project. In collaboration with WP2, WP6 prepared guidelines for reporting and drafting a post-event blog post<sup>3</sup> on the workshops and webinars carried out by the project. Comments and suggestions shall be collected through registration and post-event evaluation forms, which are being developed in cooperation with the WP2 and offered to all partners in the project. Blog post on events with the link to materials will be prepared and posted on SSHOC web page (as it was already done for SSHOC workshop<sup>4</sup> that took place at LIBER 2019 conference).

## 2.3. Explanation on delay in achieving the Milestone

The engagement activities of SSHOC as performed by WP6 are horizontal in the project and connected to the planning and work delivered by other WP6 tasks and other SSHOC Work packages. Due to recent start of certain tasks, some delays in the work and planning of other work packages, as well as in order to take into account general EOSC developments and kick-start collaboration with other EOSC-related projects, we suggested to delay the Milestone delivery date that was initially in M7 and perform the T6.2 survey in M9. This delay provided us with the opportunity to gather more input from the various project tasks, receive more tangible answers to the survey, uncover synergies and take into account EOSC developments in the preparation phase of launching the community engagement strategy.

<sup>&</sup>lt;sup>1</sup> https://twitter.com/SSHOpenCloud/status/1173629506860527617?ref src=twsrc%5Etfw [10.10.2019.]

<sup>&</sup>lt;sup>2</sup> https://www.sshopencloud.eu/join-ssh-training-community [10.10.2019.]

<sup>&</sup>lt;sup>3</sup> https://docs.google.com/document/d/1LCMiwxTb7oU-bSmMPMfJBPYU\_JugC3gsVlhBLg0WUIo/edit# [10.10.2019.]

<sup>&</sup>lt;sup>4</sup> https://sshopencloud.eu/news/social-sciences-humanities-open-cloud-what%E2%80%99s-it-research-libraries [10.10.2019.]



### 3. Conclusions and next steps

In order to manage the budget for the workshops, stakeholder forum and final conference wisely, but also achieve higher impact, we suggest leveraging synergies with other SSH events taking place in 2020 and 2021. We also believe that in this case, the respective events will attract a larger and more diverse audience within the identified target groups than organized as a self-standing event. The suggested distribution of events is prepared (see Appendix 3) but kept flexible to meet the needs of the targeted tasks and activities.

On the basis of the survey, interviews with task leaders and discussions at the consortium meetings, information sheets on SSHOC will be prepared and offered in an open form, so they can be adapted to local context if needed.

## 4. List of appendices

Appendix 1: SSHOC T6.2 SURVEY

Appendix 2: Reporting table

Appendix 3: Proposed event timeline

Appendix 4: Timeline for the survey and division of work

Appendix 5: Results of the survey



# Appendix 1

### **SSHOC T6.2 SURVEY**

Survey prepared by Task 6.2 Implemented by Sergeja Masten and Irena Vipavc Brvar (CESSDA/ADP)



#### Dear Task leader,

As written in the Grant Agreement, Task 6.2 shall, in collaboration with WP2 and in consultation with all project partners, ensure the broadest engagement of the SSHOC project with the target communities identified (D6.1). In order for the task to reach a maximum output of its work, we need to establish two-way communication that would contribute to dissemination of the project progress and ensure that feedback coming from the communities would respectively improve project work across all WPs.

With this in mind, we would like to get more information from you as a task leader. What are concrete products (tools, documents etc.) of your tasks, when they will be ready and how would you like to engage communities to help you develop better products?

In order to plan activities of Task 6.2 carefully, to reach largest community and have higher impact, we would like to invite you to a short survey.

#### Please complete the survey by September 11, 2019.

Provided information will be treated as internal one and available to WP6 partner and WP leaders. List of events will be structured by WP1 and agreed upon with task leaders, to avoid overlaps. Joint calendar should be available to all SSHOC partners. Any other use will be pre-agreed with you as a task leader.



#### Consent to collect personal data in the survey

This survey is collecting personal data: names, surnames, and email address. This information will be used when planning further activities and events. As we will collect above listed personal information, we kindly ask you to agree to the collection of your personal information before completing the survey. More information on the collection Privacy policy and general terms are available on this **link.** 



# Q5 - What are the main products the task will produce & to which deliverables/milestones are the aforementioned products linked? (Please provide delivery month.)

	What are the main products the task will produce?	To which deliverables/milestones are the aforementioned products linked?
1. Product		
2. Product		
3. Product		
4. Product		
5. Product		



#### **FIRST SECTION**

Please list in the next page events / webinars / other engagement activities your task is going to deliver in the duration of the project? Please add as much information as possible on the activity.

Q7 – FIRST/SECOND/THIRD EVENT (repeats up to 5 times)		
Topic / title:		
Date (accurate date or at least a month/year):		
Mode of event:  webinar  roundtable  conference workshop Other (please, specify):		
Target group: Multiple answers are possible		
Researchers Research and e-infrastructures Research Libraries & Archives Universities & Research Performing Organisations Policy-making Organisations Research Funding Organisations Private Sector & Industry Players Civil Society and Citizen Scientists		
Approximate audience size:  15 20 30 50 Larger		



Would you consider running your event alongside another larger event or independently?  Multiple answers are possible
 At the or along SSHOC mid-project Stakeholder Forum
At the or along SSHOC Final Conference
Along SSHOC consortium meeting
At the or along another conference / event. Specify title, date (year):
As a self-standing event. Specify:
Organized events in SSHOC should be geographically distributed. If you already have an idea / proposal of where your event will / can take place please specify (town / organizations):
Please think about speaker(s). Would that be someone from your task, someone outside your WP or an external speaker? Please name possible speakers:
Did you already identify which organizations/community can help you organize and deliver event? Please name them:
Would you consider delivering an event with another Task? Indicate the Task you could have a joint event with. Include reasoning.
event with include reasoning.



#### **SECOND SECTION**

In addition to the above mentioned and in case you did not plan any particular activities yet, but have products that you think SSHOC WP6 team can help you gather information on, engage communities to test the tool at events etc., put your ideas below.

Think about any future activity(ies) you would like to carry out within SSHOC: what will be the content/topic, to whom it will be concerned (target groups), what would you like to offer with those activities, will there be any particular products, etc. How would you like to engage SSH communities to help you to prepage best product possible? Would you like (are you considering) to co-locate an event with another organized by SSHOC or other community.

Do you plan more activities/events?
○ Yes
○ No
FIRST/SECOND/THIRD ACTIVITY/EVENT (repeats up to 5 times)
Topic/title:
Data (a servente data ev et leget e month (vecu).
Date (accurate date or at least a month/year):
Mode of event:
Owebinar
Oroundtable
Conference
workshop
Other (please, specify):
Target group:
Multiple answers are possible
Researchers
Research and e-infrastructures
Research Libraries & Archives
Universities & Research Performing Organisations
Policy-making Organisations
Research Funding Organisations
Private Sector & Industry Players
Civil Society and Citizen Scientists
Approximate audience size:
Car
①15 ○20
○ 20 ○ 30
✓ 30



○ 50 ○ Larger
Would you consider running your event alongside another larger event or independently?  Multiple answers are possible
At the or along SSHOC mid-project Stakeholder Forum  At the or along SSHOC Final Conference  Along SSHOC consortium meeting  At the or along another conference / event. Specify title, date (year):
As a self-standing event. Specify:
Organized events in SSHOC should be geographically distributed. If you already have an idea / proposal of where your event will / can take place please specify (town / organizations):
Please think about speaker(s). Would that be someone from your task, someone outside your WP or an external speaker? Please name possible speakers:
Did you already identify which organizations/community can help you organize and deliver event? Please name them:
Would you consider delivering event with another Task? Indicate the Task you could have a joint event with. Include reasoning.
Please think about speaker(s). Would that be someone from your task or would you need someone else? Please name possible speakers:



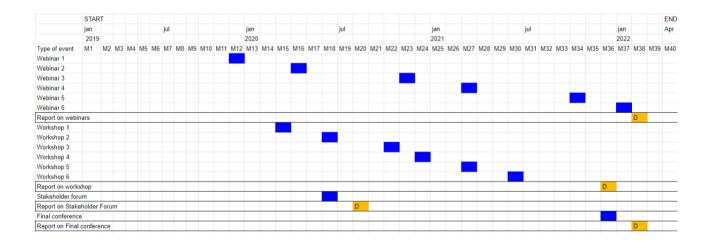
Did you already identify which organizations/community can help you organize and deliver event? Please name it:	
Would you consider delivering an event with another Task. Indicate the Task you could have a joint event with. Include reasoning.	
Any other (potentially useful) information:	
Thank you for finishing the survey!	



# **Appendix 2 Reporting table**



# **Appendix 3 Proposed event timeline**





# **Appendix 4: Timeline for the survey and division of work**

Date	Task
5-12/8/2019	First Draft (outline) prepared by Task 6.2 leader
13-16/8/2019	Comments expected from WP6 and WP2 leader
23/8/2019	Comments received from WP6 leader
28/8/2019	First version of the document ready
28-30/8/2019	Comments expected from T6.2 members
30/8/2019	Implementation of online survey
30/8/-2/9/2019	Testing (T6.2 partners) and final polishing of the survey
2/9/2019	WP6 leader notify other WP leaders about the survey
3/9/2019	Send of the invitation to Task leaders
9/9/2019	Reminder for filling in the survey to task leaders / prolong date
12/9/2019	Closing down survey
13-17/9/2019	Cleaning survey results / ask for clarification
23-26/9/2019	Feeding to MS38
1-15/10/2019	Prepare a draft strategy for events - discuss with task leaders
14/10/2019	Present results at consortium meeting/ start planning events in 2020.

WP	Leading Organization	TASK 6.2 partner responsible
WP3 Lifting Tools to the Cloud	CLARIN	CLARIN/UL-FF
WP4 Innovations in Data Production	ESS	CESSDA/UL-ADP
WP5 Innovations in data access	SHARE-ERIC	CESSDA/ GESIS
WP7 Creating the SSH Open Marketplace	DARIAH	TRUST-IT
WP8 Governance/Sustainability/Quality Assurance	CNR	LIBER
WP9 Data Communities	UNOTT	LIBER



## **Appendix 5: Results of the survey**

#### Answer 1:

T / /	14/02 0
Task number and name	WP3.2
Main products that the task will produce & to which deliverables/milestones are the aforementioned products linked (delivery month)	Task 3.2 aims to foster the use of selected global ontologies in the social sciences and humanities, regarding occupational titles, educational categories, sectors of industry, geographical regions, food items, and religions. These ontologies allow to classify elements into standard global classifications, for example the ISCO classification of occupations and its derived social status or the NACE/ISIC classification of industries. These ontologies service the usage of vocabularies for classifying text corpora and predefined response categories for survey questions. The occupational ontologies will address the 20th and 21th century. We aim to improve and optimize the above mentioned, partially existing multilingual ontologies and aims to develop use cases. As a specific case we focus on a "Multilingual SSH ontology and vocabulary for 20th century occupational titles" First, 20th century coding indexes from statistical offices will be collected and converted in the adapted ontology. Second, the life histories in SHARE survey waves 1–7 will be used to reconstruct the occupational careers and to predict the likelihood that an occupation existed for each decennium of the 20th century. Where possible the ontology will be classified according to ISCO-1958, ISCO-1968, or ISCO-1988 classifications. D3.4 Multilingual ontologies for Occupation, Industry, Regions and cities, Food items, and Religion, with use case
Engagement activity	website <a href="https://www.surveycodings.org/">https://www.surveycodings.org/</a> (continuous)
Mode of event	Website
Target group	Researchers, Research and e-infrastructures, Research Libraries & Archives, Universities & Research Performing Organisations
Approximate audience size	Large / on-line
Holding event alongside another event	At the or along SSHOC Final Conference

→ Contact Task lead and discuss possible awareness raising webinar – on the output task is producing

#### Answer 2:

Task number and name	Task 3.4 : Making Data Findable by being Citable
Main products that the task will	- Inventory of what exists et recommendations for SSH
produce & to which	communities.
deliverables/milestones are the	Implementation in cooperation with Task 3.6 and WP7 in general.
aforementioned products linked	(D3.2 Inventory of SSH
(delivery month)	citation practices, and choice for SSHOC
	citation formats and implementation planning)
	- List of SSHOC catalogues that are compatible with the proposed
	formats for citation and semantic annotation, together with



	references to and documentation of the software. (D3.5 Report on integration and exploitation of citation and semantic annotation in SSH catalogues)
Engagement activity	Workshop(s) on Data Citation
Mode of event	Workshop / around 2020
Target group	Researchers, Research and e-infrastructures, Research Libraries & Archives, Policy-making Organisations, Research Funding Organisations, Private Sector & Industry Players
Approximate audience size	30
Holding event alongside another event	Along SSHOC consortium meeting
Speaker	Person from Huma-Num (CNRS) mentioned
Consider delivering event together with another task	This event is linked with planned activities in Task 6.5

→ Contact Task lead and discuss possible events / engagement workshop

#### Answer 3:

Task number and name	T3.5 Data and Metadata Interoperability Hub
Main products that the task will produce & to which deliverables/milestones are the aforementioned products linked (delivery month)	Conversion services from key SSHOC infrastructure components such as the SSHOC switchboard. D3.1 contains information on priorities for providing such services. (D3.1, MS14, D3.6)
Engagement activity	None planned
Target group	Researchers, Research and e-infrastructures, Research Libraries & Archives
Consider delivering event together with another task	No events planned for T3.5. However, the conversion services should be advertised via the SSHOC marketplace WP7 and the partner infrastructure registries and catalogues, and therefore we'd be happy to participate in events where we could promote the conversion services.

→ Discuss possible engagement together with T3.5 and WP7 lead. See how to raise awareness of the work from T3.5 in WP7 events.

#### Answer 4:

Task number and name	3.6 Making Data Re-usable and Actionable
Main products that the task will	Generalised Switchboard and integrations MS09, MS12
produce & to which	
deliverables/milestones are the	
aforementioned products linked	
(delivery month)	



Engagement activity	No events planned
Engagement activity	No events planned

→ No suggestions for further actions. Continue to follow development of WP.

#### Answer 5:

Task number and name	Task 4.1: A sample management system for cross-national web
	surveys
Main products that the task will	A sample management system for cross-national web surveys
produce & to which	D4.1 Detailed specification of the sample management system
deliverables/milestones are the	D4.2 Ready to use sample management
aforementioned products linked	system
(delivery month)	MS4.1 Test of Sample Management System in
	three countries complete
Engagement activity	No events planned

→ Task did not plan any events. However, Sample managements system for sure should be of interest to researchers and survey collection agencies. Contact task lead and suggest events.

#### Answer 6:

Task number and name	T4.4 & T4.5
Main products that the task will	Social Policy API Deliverable 4.14 (M12)
produce & to which	
deliverables/milestones are the	
aforementioned products linked	
(delivery month)	
Engagement activity	No event planned
Target group	Research and e-infrastructures
Holding event alongside another	At the or along SSHOC mid-project Stakeholder Forum, At the or
event	along SSHOC Final Conference, Along SSHOC consortium meeting,
	At the or along another conference / event.
Speaker	Person from OECD mentioned

→ Did not build in the DoW a dissemination event but would benefit from it. Suggest further discussion with T4.4 and T4.5 to set proposed time frame for event.

#### Answer 7:

Task number and name	T5.2 Hosting and sharing data repositories
Main products that the task will	D5.5 Data repository service running on EOSC (hosting and
produce & to which	sharing repositories) This service will be built with the DataverseNL
deliverables/milestones are the	software (Month 38)
aforementioned products linked	D5.6 Report on principles of governance and sustainability of the
(delivery month)	data repository service (Month 40)
Engagement activity 1	Dataverse workshop for data archivist (train the trainer) (Y 2021)



Mode of event 1	Workshop
Target group 1	Research Libraries & Archives, Universities &
	Research Performing Organisations
Approximate audience size	20
Holding event alongside another	At the or along SSHOC mid-project Stakeholder Forum,
event	At the or along another conference / event
Speaker	From the task
Engagement activity 2	Dataverse webinar for end users (Y 2021)
Mode of event 2	Webinar
	Webillal
Target group 2	Researchers, Research and e-infrastructures,
Target group 2	
Target group 2  Approximate audience size 2	Researchers, Research and e-infrastructures,
	Researchers, Research and e-infrastructures, Research Libraries & Archives

→ Contact Task lead and discuss possible events / engagement workshop (awareness raising) and webinar.

#### **Answer 8:**

Task number and name	T5.4 Remote Access to Sensitive Data
Main products that the task will	- Framework for Data Use Agreements (18) (D5.9 Framework for
produce & to which	Data Use Agreements)
deliverables/milestones are the	- Data Confidentiality Levels for Sensitive Data (24) (D5.10 Data
aforementioned products linked	Confidentiality Levels for Sensitive Data)
(delivery month)	- Policy paper on Remote Secure Access for CESSDA (tbd) (M28 Assessment of existing platforms)
	- Assessment of existing platforms (24) (M28 Assessment of existing platforms)
	- Recommendations for a platform for further expansion (40)
	(M30 Recommendations for a platform for further expansion)
Engagement activity	Meeting of Secure Data Professionals Network (2021)
Mode of event	webinar
Target group	Research Libraries & Archives
Approximate audience size	15
Holding event alongside another	Task does not have any travel budget. If online event.
event	
Speaker	Representatives from other successful Remote Access secure
	facilities might be of interest.
Consider delivering event together	Yes, task to be identified.
with another task	

→ Contact Task lead and discuss possible webinar.

#### Answer 9:



Task number and name	5.5 Preparing cross national survey data for the EOSC. ESS pilot/use case
Main products that the task will produce & to which deliverables/milestones are the aforementioned products linked (delivery month)	- Integrated data and metadata repository enabling API access – basing on FAIR (D52 Recommendations for a FAIR compliant integrated data and metadata repository) - API communicating with repository based on FAIR (D52 Recommendations for a FAIR compliant integrated data and metadata repository) - Consumer API communicating with repository based on FAIR (D52 Recommendations for a FAIR compliant integrated data and metadata repository) - Report on guidance and recommendations for how to design and implement a FAIR-compatible metadataguided solution for storage and dissemination (D53 Report on preparing the ESS for Services in the EOSC)
Engagement activity	None identified
Target group	Researchers

→ Contact Task lead and discuss possible event. Perhaps more linked to promotion activities at ESS linked event.

#### Answer 10:

Task number and name	T5.6 Issues in providing Open Data in Heritage Science and Archaeology
Main products that the task will produce & to which deliverables/milestones are the aforementioned products linked (delivery month)	- FAIR open data set related to a database of samples examining the preparations of 16th -century Italian paintings. (from the EU H2020 IPERION CH Project)- Report on opening access to research data in the Heritage Science and Archaeology domain / linked to D5.15 (M38)  - FAIR open data set related to the Raphael Research Resource (https://cima.ng-london.org.uk/documentation ) (D5.16 Report on making heritage science data FAIR (Open data in Heritage Science and Archaeology))  - Improved FAIR version of the CNR MOVIDA database software, to allow for more open data sharing. (D5.16 Report on making heritage science data FAIR (Open data in Heritage Science and Archaeology))
Engagement activity 1	Discussions with E-RIHS communities
Target group 1	Researchers, Research and e-infrastructures
Engagement activity 2	Discussion with ARIADNEplus communities
Target group 2	Researchers, Research and e-infrastructures, Universities & Research Performing Organisations, Private Sector & Industry Players



- → No need for an event, would however like to have broader discussion with broader Heritage Science communities
  - o Suggest presentations at dedicated conferences / awareness raising activity

#### Answer 11:

Task number and name	T8.2
Main products that the task will	Certification Workshop (appr. M18); D8.3
produce & to which	
deliverables/milestones are the	
aforementioned products linked	
(delivery month)	
Engagement activity	Certification Workshop; around M18
Mode of event	workshop
Target group	Research and e-infrastructures, Research Libraries & Archives
Approximate audience size	20
Holding event alongside another event	At the or along SSHOC mid-project Stakeholder Forum, Along SSHOC consortium meeting, At the or along another conference / event. (Any event where the target audience would be likely to attend anyway.)
Speaker	Experts from T8.2.
Consider delivering event together with another task	Possible

→ Contact Task lead and discuss possible events / engagement workshop