



Deliverable D2.1 – Dissemination Plan

OPENING UP new methods, indicators and tools for peer review, impact measurement and dissemination of research results

Project acronym: OpenUP

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Table of Contents

Disclaimer	2
Table of Contents	3
List of figures	4
List of tables	4
Abbreviations	4
Summary.....	5
1. Project Background	6
2. Dissemination in OpenUP: a definition approach.....	7
3. Key elements of the OpenUP Dissemination Strategy.....	8
3.1. Dissemination goals and objectives.....	8
3.2. Main questions.....	9
3.3. The dissemination lifecycle phases.....	10
3.4. Levels of Dissemination	11
4. Target Groups	14
5. Dissemination Tools & Key activities.....	18
5.1. Online Dissemination & Interaction	18
5.1.1. OpenUP Website	18
5.1.2. OpenUP RRI Information Hub and moderated blog.....	19
5.1.3. Social media	19
5.1.4. Newsletter and Briefing memos.....	20
5.1.5. Calendar.....	20
5.2. Offline Dissemination & Tools.....	20
5.2.1. Leaflets.....	20
5.2.2. Factsheets	20
5.2.3. Posters.....	21
5.2.4. Project publications.....	21
5.3. Physical & Interactive Dissemination Support.....	21
5.3.1. OpenUP events.....	21
How-to Workshops	21
Conferences.....	21
Training material & coaching video series.....	22
5.3.2. Participation in third party activities	22
Participation in external events.....	22
Synergies with other projects.....	22
6. Assessment & KPIs.....	23
7. Expected impact.....	27

List of figures

Figure 1: Dissemination lifecycle phases	10
Figure 2: Levels of Dissemination	11

List of tables

Table 1: First level of Dissemination.....	11
Table 2: Second level of Dissemination	12
Table 3: Third level of Dissemination.....	12
Table 4: Addressing OpenUP’s stakeholders	15
Table 5: Dissemination activities	17
Table 6: Quantitative & quantitative impact indicators.....	24

Abbreviations

CA – Consortium Agreement

DoA – Description of Action

DoW – Description of Work

EC – European Commission

GA – Grant Agreement

KoM – Kick-off Meeting

OSF – Open Science Framework

PM – Project Manager

PMB – Project Management Board

WP – Work Package

WPL – Work Package Leader

Summary

OpenUP addresses key aspects and challenges of the currently transforming science landscape and aspires to come up with a cohesive framework for the review-disseminate-assess phases of the research life cycle that is fit to support and promote Open Science.

To this end, OpenUp will engage key stakeholders in a multiple-level approach, such as researchers, publishers, institutions and funders, industry and citizens, and via a series of outreach and training events. The OpenUP consortium recognises that dissemination is an essential and pervasive activity throughout the project's life, and integrated within all work packages.

This document provides a definition of dissemination and covers the list of key elements of OpenUP's dissemination strategy· hence the goals, the main questions, the lifecycle phases and the levels of dissemination. Furthermore, this document, identifies target communities and their distinctive characteristics; elaborates means (key activities) for reaching out to targeted audiences; describes and prioritises dissemination tools. Finally, OpenUP consortium defines the monitoring processes and tools that will help to assess the performance of the dissemination activities and outlines the expected impact of its dissemination strategy.

The dissemination plan and timelines have been closely aligned with the OpenUP events, deliverables and milestones in a way that communication activities are likely to be more intense pre- and post- them.

1. Project Background

The OpenUP project addresses key aspects and challenges of the currently transforming science landscape and aspires to come up with a cohesive framework for the review-disseminate-assess phases of the research life cycle that is fit to support and promote Open Science. Its main objectives are to a) identify and determine ground-breaking mechanisms, processes and tools for peer-review for all types of research results (publications, data, software), b) explore, identify and classify innovative dissemination mechanisms with an outreach aim towards businesses and industry, education, and society as a whole, and c) analyse a set of novel indicators that assess the impact of research results and correlate them of channels of dissemination. To achieve these objectives, the consortium will follow a user-centred, evidence-based approach, engaging all stakeholders (researchers, publishers, funders, institutions, industry, public) in an open dialogue through a series of workshops, conferences and training, and validating all interim results via a set of seven pilots involving communities from four research disciplines: life sciences, social sciences, arts & humanities, energy. The project will also involve surveys, interviews, case studies, workshops and focus group activities. The final result of the project will be a set of concrete, practical, validated policy recommendations and guidelines for national and European stakeholders, including EU institutions, a valuable tool in advancing a more open and gender-sensitive science system.

2. Dissemination in OpenUP: a definition approach

Dissemination is the act of widely spreading something, especially information, the circulation of information¹. This generic definition is in the context of European funded projects usually aligned to the process of making the project results and deliverables available to the stakeholders and to the wider audience².

This is, however, a definition which narrows down the meaning of dissemination only to the distribution of contractually related information and ignores any innovative aspects and feedback loops this process can have.

In the frame of OpenUP the following generic definition of dissemination has been adopted:

Dissemination is a planned process that involves consideration of target audiences and the settings in which research findings are to be received and, where appropriate, communicating and interacting with wider audiences in ways that will facilitate research uptake in decision-making processes and practice³.

It has to be pointed out that dissemination has in OpenUP a twofold dimension: being a Support Action, dissemination and communication activities are of paramount importance to maximize its impact and trigger effects across the targeted stakeholders and communities. OpenUP is, however, in parallel a project that also approaches dissemination from a “theoretical” point of view, by developing and proposing novel concepts and mechanisms for broadcasting research results in the frame of WP4.

In this deliverable we will deal with the first aspect, taking obviously into account any related research findings that will be formulated within the WP4 activities.

¹ Oxford Living Dictionaries, <https://en.oxforddictionaries.com/definition/dissemination>

² http://ec.europa.eu/chafea/management/Fact_sheet_2010_06.html

³ Based on n Wilson et al. 2010

3. Key elements of the OpenUP Dissemination Strategy

The strategic planning precedes any successful dissemination activity. We consider dissemination as a continuous task throughout the projects' lifetime, which will embrace all project activities. The definition of dissemination in the previous section will serve as a compass in OpenUP and provide the generic framework. Moving, however, to the implementation, you need to formulate the dissemination strategy that results from the generic definition and finally break down this strategy in a concrete dissemination plan.

The cornerstones of the OpenUP dissemination strategy are

- a. The formulation of objectives and goals
- b. The formulation of the main (major, important) questions that need to be answered during this process.
- c. The definition of the dissemination lifecycle
- d. The distinguishing of the dissemination levels

3.1. Dissemination goals and objectives

The overall goal of the OpenUP dissemination activities will be to establish an open dialogue with the communities addressed by the project, targeted stakeholders and broader audiences, so as to ensure the communication of the project rationale, objectives and methodology, diffuse projects activities and achievements and support the exploitation of project results. While doing so, OpenUP will also promote any research outcomes and findings from RRI (Responsible Research & Innovation) and OS (Open Science) projects and raise awareness about these issues. In parallel, and as a result of the open dialogue, OpenUP partners will infuse any feedback coming from the communities and stakeholders, so as to adjust, if needed, not only the dissemination objectives but also the work plan (better expression).

The specific objectives of the dissemination strategy are the following:

Objective 1 – Raising awareness on the issues of review-dissemination-impact and highlight the benefits and importance of open science.

Objective 2 – Increasing interactions and delivering support for better coordination among key stakeholders.

Objective 3 – Creating opportunities for **collaboration** between ongoing initiatives.

Objective 4 – Creating a strong and recognizable **OpenUP brand**, identity and key messages to be used on all dissemination material.

Objective 5 – Generating positive **media coverage** for the project at a local, national, European and global level.

Objective 6 – Supporting sustainability and visibility of the research results even after the project's lifetime.

The OpenUP dissemination plan will be inherently linked to and shaped around the dissemination goals of the project. OpenUP will underpin all of its dissemination actions with the desired needs of the identified target audiences, project results and the impact of past dissemination efforts. Any dissemination collateral (website, posters etc.) and the planned Open Information Hub should be considered as “living deliverables” and will be shaped in a way to complement and exploit all other

project results during the lifetime of OpenUP but also allowing for their sustainability beyond the end of the project.

3.2. Main questions

The OpenUP dissemination strategy will be structured around the main questions “**what, who, how, when**”:

- I. **Objectives:** what are the main objectives of the dissemination activities?
- II. **Audience:** who are the target groups for dissemination activities?
- III. **Tools:** how will the dissemination strategy be implemented?
- IV. **Time:** when should dissemination start and take place?

Answers to these four main questions will be not provided only once, at the beginning of the dissemination process, but the outcomes of the dissemination activities will be monitored, the feedback will be assessed and any necessary adjustments will be undertaken. The OpenUP consortium will work on multiple levels in parallel: dissemination aims, objectives and tools will be clarified and agreed within the OpenUP partnership. The partners’ organisations constitute the intermediate level, as it is important to ensure their commitment and engagement. Constant work at the internal and intermediate levels will allow for efficient outreach to the broader community, which is the ultimate aim of the project.

OpenUP partners believe that there is no such thing as “one size fits all”. We will therefore implement the dissemination strategy choosing the right tools for each community and each activity. The question on “when to disseminate” will be addressed in the same way: knowing the communities OpenUP is targeting from inside and being actually part of them, we will always make an informed choice on when to promote a concrete piece of information. We will try to maximise our outreach by following the principle of “the right information to the right audience in the right time”, taking into account in parallel the “sooner than later” approach for all our dissemination activities.

3.3. The dissemination lifecycle phases

As already mentioned, dissemination is in OpenUP a continuous and dynamic task. We split it in three distinguished phases, which are interlinked. Starting point is the definition of concrete dissemination objectives. This is followed by the implementation phase, during which a continuous monitoring of the activities will take place. Finally, the evaluation of performance will help the OpenUP partners to make any necessary improvements.

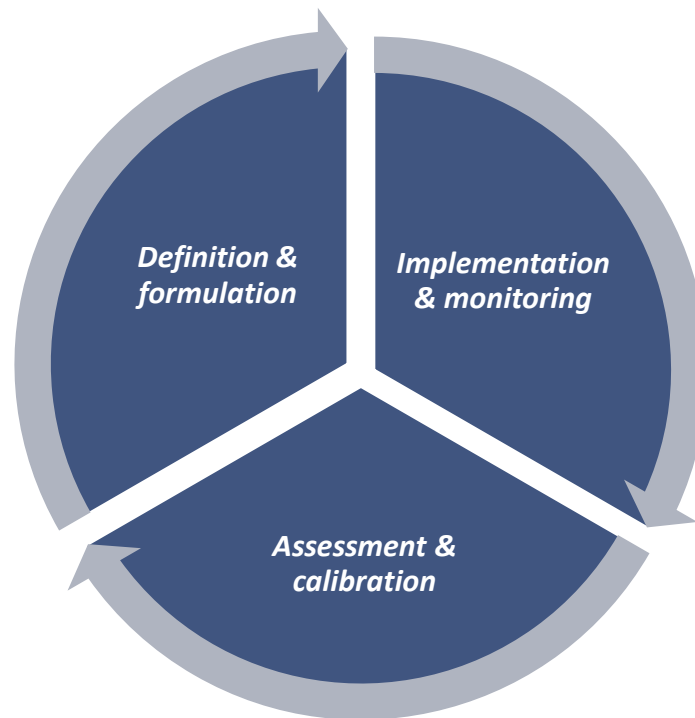


Figure 1: Dissemination lifecycle phases

The phases are in detail:

- (i) Definition & formulation:** In this phase OpenUP partners are going to set concrete dissemination objectives and identify the ways and means of achieving them. An analysis of strengths, weaknesses, opportunities and threats will be implemented to reveal critical areas in the dissemination process.
- (ii) Implementation & monitoring:** The implementation and monitoring phase includes the execution of the necessary strategies to meet the objectives that have been set. To ensure success in the dissemination methods, appropriate activity measures will be taken into account to provide feedback that identifies positive impacts and areas for change. All OpenUP partners will be actively engaged in the implementation and monitoring of the dissemination activities, focusing primarily (but not exclusively) on their area of expertise.
- (iii) Assessment & calibration:** A very useful stage of the dissemination strategy is the evaluation procedure of methods and activities used in the implementation phase, which serves as performance feedback and ensures successful dissemination completion. Analyzing present state -based on key performance indicators, and other qualitative and quantitative data- compared to desired future state will give to project partners the possibility to identify the need for new dissemination tools and activities and to make any necessary corrective changes.

3.4. Levels of Dissemination

The OpenUP dissemination strategy will be implemented progressively in three main levels: within OpenUP consortium, within partners’ organisations and networks (including institutions with several institutes, departments, offices, and teams), and towards the broader community (key stakeholders, networks, related projects, etc.). **(Figure 2)**. This graphical layering is based on the differentiation among OpenUP’s target groups, their requirements and it represents how easily they can be reached. The two first levels represent the direct environment of OpenUP consortium and level 3 describes the overall picture of OpenUP’s target communities. All target communities are grouped based on the similarities among them and their proximity to OpenUP direct environment. Par example, educators and young scholars are more related than policy makers and they are more close to OpenUP as they belong to the academic community than SMEs and IT providers.

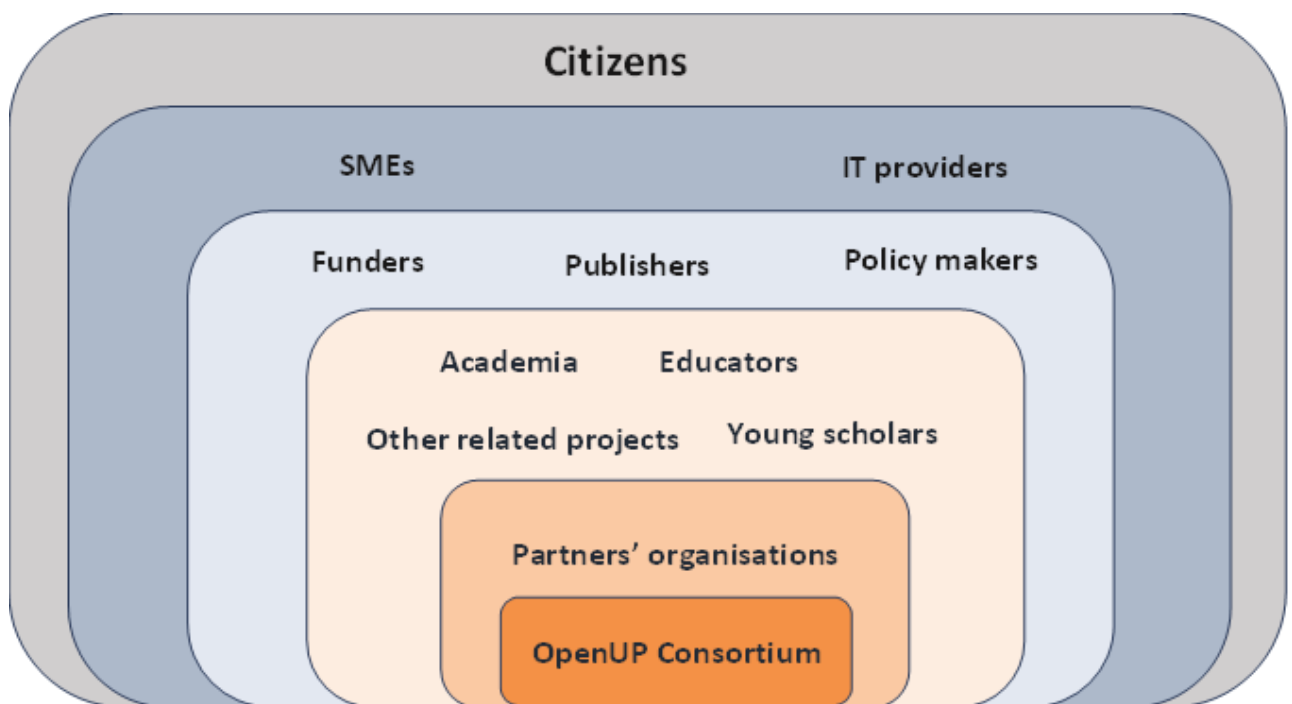


Figure 2: Levels of Dissemination

The table that follows briefly outlines the aims in relation to each group, as well as methods and activities that will be undertaken by OpenUP.

Table 1: First level of Dissemination

Level 1: Within OpenUP partnership

Dissemination Aims	Methods & Activities
Link and bring together people working on similar topics across consortium, in order to create working groups that will implement common activities (e.g. focusing on the 3 pillars of	Review profiles & interests of partner teams across consortium

the project: peer review, indicators, innovative dissemination)	Organise team building sessions within project meetings
Establish Work Package (WP) and task teams and inspire common goals and collaboration	Organise dedicated WP team meetings within plenary meetings or ad hoc
Create single point of reference for all dissemination material and practices across consortium	Establish virtual communication & collaboration tools for consortium members
Establish communication mechanisms and channels within consortium	Set up internal mailing list for project & key activities Prepare guidelines, templates and reference spaces for dissemination activities & materials
Facilitate and support direct collaboration and information sharing among partners	Syndicate partner web sites, blogs and Twitter accounts (e.g. through RSS feeds, Twitter groups)
Provide good guidelines and materials for dissemination activities planning, implementation & reporting	

Table 2: Second level of Dissemination

Level 2: Within partners' organisations & networks

Dissemination Aims	Methods & Activities
Discover people, departments & initiatives within partner organisations that are relevant to project and that should be aware about progress & outcomes	Review organizational websites about relevant people, depts., initiatives
Set up continuous communication mechanisms and channels to share OpenUP progress with relevant people	Regularly set up internal informal & formal meetings Use internal mailing & communication lists
Involve relevant people from other departments and initiatives even if not directly contributing to OpenUP implementation	Take advantage of internal knowledge sharing & training events
Create awareness to internal decision makers that can help OpenUP	Inviting to project meetings, workshops & events

Table 3: Third level of Dissemination

Level 3: Towards core target groups, key stakeholders, decision makers and the broader community

Dissemination Aims	Methods & Activities
Academia, Educators, Young Scholars, other related projects	Include in planned use case pilots relevant data of importance to specific networks & communities

Establish links with relevant networks & communities of scientists that partners are involved into	Organise special training & hands on sessions or workshops at events where communities gather
Organise targeted actions to inform & engage scientists in the networks & communities where partners have direct access to	Provide online access to the training material
Create links and synergies with relevant initiatives where partners are involved	Consider creating ad hoc working groups related with networks of relevance
Take advantage of open data & open research initiatives & movements where partners are involved	Promote OpenUP within existing networks
Establish links with other Open Science research projects and initiatives	Use online channels and social media to create awareness in existing networks
Publishers, Policy makers, Funders	Join or organise clustering events with coordinators of research projects
Organise targeted actions to inform & engage publishers, and content providers outside the partner networks	Organise visits to key institutions
Carry out actions targeting institutions & networks of strategic importance	Organise visits & meetings with project coordinators
Prepare briefings for policy makers and funders	Organise meetings with national stakeholders
Organize targeted actions to raise awareness among policy and decision makers	Host events where any interested stakeholder may join and discover more about project
Organise targeted actions to promote Open Science to policy makers and funders	Prepare information material for decision makers
Inform funding agencies, donors	Organise press campaigns for public media
SMEs, IT providers	
Promote project outcomes to Open Science stakeholders	
Organise targeted actions to inform & engage IT solutions providers outside the partner networks	
Promote project outcomes & opportunities to related startups to engage further	
Citizens	
Inform general public	
Prepare scientific information for distribution within non-scientific audiences	

4. Target Groups

Who are the target groups for the dissemination activities? (WHO)

OpenUP address review - disseminate - assess cycle phases of the research lifecycle to support and to promote Open Science. This triptych is a multifaceted process involving different stakeholders in both **commercial** or **research** background. Within these two aforementioned areas, OpenUP should address in all its communication the groups that have been identified on the various dissemination levels (check Section 3.4). In addition to these, OpenUP will also target the general public and laymen, who are interested in **open research** and local, national and EU policy makers & funders, who are interested in receiving policy **recommendations** and **feedback**. This distinction among the different stakeholders' needs/concerns, has led to the formation of five areas of interest: **Commercial, Research, Education / Educational Training, Recommendation** and the **General science education**.

The support and satisfaction of each different target group's needs will be achieved through direct dissemination activities and by leveraging the individual skills and community memberships of the project partners. The intended impact of the dissemination strategy will cut across all aforementioned areas of interest and will utterly focus on these considered crucial, such as research and commercial as well as educational training and policy recommendations, to contribute to the successful messaging of OpenUP project towards an Open Science ecosystem

In the following table we describe who the main stakeholders are, what is the area of interest for each of them, examples of support they need, and finally who are the OpenUP partners primarily engaged. The latter doesn't of course imply in any way that other OpenUP partners are excluded from the particular activities; dissemination is in OpenUP a joint effort, as it has been already stressed out.

Table 4: Addressing OpenUP's stakeholders

Stakeholder	Area of Interest	Description	What support do they need?	OpenUP partners involved
Publishers	Commercial, Research	Publishers who are interested in open science and publishing developments.	<ul style="list-style-type: none"> • Understanding and adapting new reviewing methods • Measuring their success through altmetrics & bibliometrics • Disseminating their content in innovative ways 	Frontiers, PPMI
Researchers & Young Academics	Educational Training, Research	<p>Researchers in Europe and beyond, predominantly from the OpenUP's use case related areas.</p> <p>Young researchers who just started their academic career and need consultancy and advice on publishing and increasing impact of scientific work.</p>	<ul style="list-style-type: none"> • Finding novel ways to disseminate their research • Measuring their success through altmetrics & bibliometrics • Advice on how to prepare a good paper, what are the review process formalities • Guidance on what are the differences between open access and traditional publishing • Assessing the quality/credibility of a scientific results 	UoA, UGOE, UvA, AIT, KNOW, DZHW
Academia Educators & R&I Project Managers	Education, Research	<p>Academic teachers in European universities who would like to support their students in publishing and disseminating their work.</p> <p>Academic teachers who would like to stay on top of their field.</p> <p>Project managers who are interested in analyzing the impact of scientific work &</p>	<ul style="list-style-type: none"> • Finding novel ways to disseminate their research • Impact assessment through altmetrics & bibliometrics • Advice on where to find the latest research in various areas • Assessing the quality/credibility of a scientific results 	UoA, UGOE, UvA, AIT, KNOW, DZHW

		correlating them to dissemination channels.		
Local, national and EU policy makers & funders Project Managers	Recommendations	Decision-makers of governmental and funding agencies that design interventions and fund programmes related to open science and innovation, in Europe and the world. Private funders, companies that fund independent research projects.	<ul style="list-style-type: none"> • Conducting evidence based assessments • Obtaining the tools to move beyond the current status quo 	PPMI
Institutions	Research, Commercial	Institutions that are interested in reinforcing their researchers in disseminating their work with innovative & effective ways and in analyzing the impact of scientific publications.	<ul style="list-style-type: none"> • Integrating new indicators for researcher career advancement • Adapting to emerging business models for journal subscriptions • Expanding their services for data management • Assessing their research outcome 	All partners
Industry (IT providers, startups and SMEs)	Commercial, Educational Training	IT solutions providers and new tech startups developing software products, tools & apps for open publishing alternative peer reviewing, innovative dissemination and assessment.	<ul style="list-style-type: none"> • Adaption of scientific results • Familiarizing & adopting state-of-the-art techniques/results • Assessing the quality/credibility of a scientific results 	DZHW, AIT, CNR, KNOW
Citizens	General science education	General public and laymen, who are interested in open research	<ul style="list-style-type: none"> • Using science • Familiarizing with state-of-the-art techniques/results 	UvA, AIT, UoA, PPMI

The table below provides examples of dissemination activities and matches them to OpenUP partners. In several cases this is just an indication, as it is expected that all partners will contribute to them.

Table 5: Dissemination activities

Activity	Partner(s)	Details
Producing and updating dissemination plan	UoA, PPMI, ALL	Producing the OpenUP dissemination plan based on strategic objectives of the consortium and updating the document in response to impact, exploitation activity and project progress
Producing and updating communication plan	UoA, PPMI, ALL	Planning and reporting on communication activity, setting up communication channels and
Producing factsheet	PPMI	Production of project factsheet detailing project aims and objectives as well as consortium information and project contact details
Producing project posters	UoA	Production of project poster to be displayed at relevant public events
Producing project flyers	PPMI, UoA	Production of project flyer to be displayed at relevant public events and distributed online
Creating and updating the website	PPMI,UoA	Creation of OpenUP project website using logo, branding and containing areas for sharing project information, downloads, user guideline releases, feedback and hosting project blog/news section and links to online communities, events calendar (social media, forums, YouTube etc.)
Provision of content for the website	ALL	Sourcing and publishing relevant content for the blog/news section of the OpenUP website. Updating the website for at least 6 months after the closing of the project
Uploading blog content and uploading of social media content	ALL	Community management of OpenUP project digital channels, editing blog content, scheduling content to be published. It is expected that ALL partners will upload relevant blog and social media content to support involvement at scientific and commercial events, meetings and conferences in order to provide original and rich content
Creating and maintaining social media profiles	UoA, PPMI, ALL	Registering relevant profiles and URLs for project dissemination and communication, updating with branded imagery and logos, updating with consortium-sourced content and recording analytics.
Producing social media content (Tweets, posts on LinkedIn etc.)	PPMI, UoA, all	Tweeting and re-tweeting, start LinkedIn group conversation, circulate news and interesting articles through social media
Reporting on social media and website analytics	PPMI,UoA	Responsibility for the project website will include the establishment and reporting on website and social media analytics
Managing social media and blog schedule	ALL	Updates to the blog and social media will be organised using a project calendar to ensure there is the correct volume of dissemination coverage during important/relevant periods of the project lifetime
Coordinating discussions on LinkedIn group	UGOE, AIT, KNOW, Frontiers	Planning relevant commercial/research topics for discussion on LinkedIn group, coordinating posts from consortium partners, looking for responses from collaboration partners and recording results.
Organising events and workshops	UoA, UGOE IFQ, AIT	Organising awareness raising conferences and workshops to attract targeted and broader audiences, present project results and facilitate presentation of results of other related projects
Organising training events	UoA, UGOE	Organising training workshops for young scholars, on topics such as increasing impact of research results and efficient dissemination strategies

5. Dissemination Tools & Key activities

Mechanisms and channels with which the target groups will be reached (HOW)

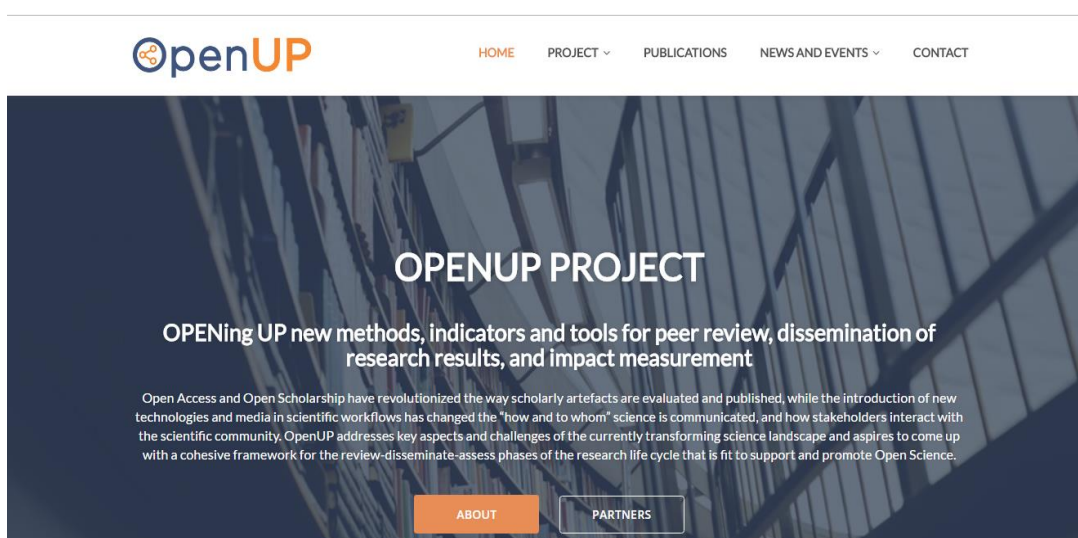
OpenUP dissemination strategy will reach out, actively engage and involve all different stakeholders via a series of targeted outreach activities. It will reach and engage all stakeholders of the research community (researchers, universities, research institutes, European and international organisations, funders and ministries, content publishers) to raise awareness of the RRI review-dissemination-assessment aspects. This increased level of **engagement** will feed into the development of **research and innovation policies** that aim to support and complement Open Science. It will also include ways in which the project will communicate to the rest of its important stakeholders, such as the **general public** and **industry**.

All available tools and activities have been grouped depending on the nature of each mean in the following three categories **(i) online and interactive tools and channels**, **(ii) non electronic tools and channels**, and **(iii) physical interactive tools and channels**.

5.1. Online Dissemination & Interaction

5.1.1. OpenUP Website

The project website was the first outreach tool that has been put in place almost from the beginning of the project. It contains detailed information on the aims, objectives, consortium, work processes and the current state of the OpenUP project and provide information for all interested parties and the general public. The website was launched in July 2016 and is hosted on <http://openup-h2020.eu/>. It hosts the outreach related content as: project related information (the project background, its goals & objectives and a short description about the consortium partners), the periodical newsletter that provides updates on the project state, project publications and further information related to OpenUP, dissemination material, deliverables and event calendars. Furthermore, it will feature installations of stakeholder discussion panels, workshops, and social media campaigns (see Section 5.1.3). It will use existing Open Science channels and networks (e.g., OpenAIRE, FOSTER, Open Knowledge, RRI-tools, RDA) to expand the outreach and involve all key players. The figure below (figure number) represents the front page of OpenUP website.



Picture 1: Front page of OpenUP website

5.1.2. OpenUP RRI Information Hub and moderated blog

OpenUP will create a dynamic and collaborative Knowledge Base collecting information and results from the different project activities. It will create a directory/catalogue of available tools, best practices, policies and guidelines so that this Knowledge Base/Information Hub becomes the reference point for the community in all topics relevant to the triptych review-dissemination-assessment. The hub will be developed on standard open software to guarantee its long-term usage. It will also host a moderated blog so that community members are able to express their opinions or put out new ideas.

Within the OpenUP RRI hub we will set up a blog that will collect and promote interesting point of views and articles on open science, alternative peer review and impact assessment, as well as innovative dissemination. It will also promote OpenUP activities and publications in the above areas. The aim is to attract and bring together all key actors and practitioners and to facilitate a debate among them. It will be a channel of communication and a common place where new ideas, suggestions and beliefs will be expressed

The OpenUP RRI hub and blog are considered as important outreach activities that have the potential to survive the closing of the project. For this reason, specifications and aims will be analysed in a dedicated deliverable.

5.1.3. Social media

The dual purpose of the project dissemination indicates to make use of the innovative recommendations of WP4 (Innovative Dissemination Framework) in aim to raise awareness of the Open Science ecosystem and a gender sensitive environment for innovative research. With this in consideration, OpenUP consortium will set up the appropriate social media accounts (Twitter, Facebook, LinkedIn, SlideShare, YouTube) and aim constant presence with new content to reinforce OpenUP messaging. Participation in academic social networks (e.g. ResearchGate, Academia.edu or Mendeley) will be also considered, especially after a number of OpenUP publications are published.

The OpenUP social media accounts are managed by the coordinator and the dissemination partner of the project, who can upload messages and information via the official social media profiles.

On selected occasions and for promoting either important project activities (e.g. an OpenUP conference) or important community events and initiatives (e.g. Peer Review Week) social media campaigns will be launched. These will have a clear focus and will convey a targeted message.

OpenUP activity on Twitter will be constant, posting tweets on a daily basis, providing global updates to policies scholarly information topics and publications of the project. OpenUP presence on LinkedIn will focus on providing information material about the project progress and community updates and events.

Social media presence has also started early enough and for organizing this process short guidelines have been drafted, with particular focus on Twitter. These include among others:

- Using specific hashtags related to OpenUP's activity area (e.g. #peerreview, #researchdissemination, #altmetrics) and mentions, for instance "@ProjectOpenUP", in case of mentioning OpenUP project, in aim to increase our visibility within our target audiences.
- Using specific hashtags related to the subject of social media campaigns. For example, using #PeerRevWk16 when mentioning Peer Review Week 2016.

- During Social Media Campaigns there will be some targeted actions from all consortium partners. Project's partners will retweet or like the important posts of OpenUP to disseminate them through their personal communication channels.

Moreover, OpenUP will develop activity in SlideShare (for presentations) and YouTube (for videos) for supplementary help in its social media presence and activity. Any project presentations will be shared via the SlideShare account and the coaching video series will be shared via YouTube.

Profiles will also be created on third-party platforms, partner's networks, communities and external blogs to increase presence and visibility.

5.1.4. Newsletter and Briefing memos

A periodical newsletter will be released in order to provide updates on the project state and further information related to OpenUP, to keep the community informed on Open Science policy issues and to activate them on matters of the review-disseminate-assess cycle.

The OpenUP newsletter will occasionally include targeted briefing memos to funding agencies and donors (e.g. project officers, unit directors) and national/regional government officials (scientific advisors, officials in Ministries of Science & Technology, etc.) addressing policy matters.

5.1.5. Calendar

The Calendar is a feature of the OpenUP website and provides updates on the project conferences and workshops but also on open science and community events, as well as events organized by related projects. The information is collected through the partners' networks, collaborations with other related projects and information received from open science initiatives.

The calendar will be also a useful tool for the OpenUP consortium as it can deliver input to all other dissemination channels and influence then "when" aspect of the OpenUP dissemination.

5.2. Offline Dissemination & Tools

5.2.1. Leaflets

OpenUP leaflets will be designed in aim to clearly present the purpose, the objectives and activities of the project and they will be handed out at each event OpenUP partners participate in. They will also be published on the project website and shared through social media.

In addition to the overall presentation of the project, separate leaflets will be produced for each of the three targeted project areas (peer review, impact assessment, innovative dissemination). The aim is to address thereby each community in a customized way.

5.2.2. Factsheets

The OpenUP factsheets will cover updates concerning Open Science, review – disseminate – assess lifecycle and information about the project. The factsheets will take thematic approaches answering key questions of specific stakeholders:

- Researchers & young academics

- Project managers & academia educators
- Publishers
- European & national policy makers and Funders

The topics to be reached will answer to the following questions:

- Why? – OpenUp purpose and objectives.
- What? – “What we do”. A flowchart describing the steps of review – dissemination – assess cycle. What the impact of OpenUP is.
- How? – “How OpenUp is going to help you”. Which are the benefits of Open Science for them.
- Who? – “Who we are”, hence a brief description of OpenUP project.

An electronic version (e.g. PDF file) will also be circulated electronically on the project website and on social media.

5.2.3. Posters

Posters and roll-up banners will be specially designed to be used at events that the project will organize and will allow the consortium to catch attendees’ attention and to communicate its message to large audiences in a comprehensive way in a short period of time.

5.2.4. Project publications

It will be a major aim to channel the project results to scientific papers, and thereby contribute to an evidence based understanding of the techno-social. Ad hoc articles and newsletters will be published in Open Science and Peer Review magazines and newsletters in order to raise awareness and knowledge of the project’s activities.

5.3. Physical & Interactive Dissemination Support

5.3.1. OpenUP events

How-to Workshops

Training workshops for young academics on peer review and novel dissemination: We will provide practical advice and mentoring on how to prepare a good paper, what are the review process formalities, what are the differences between open access and traditional publishing, etc. Based on the outcomes of WP4 (Innovative Dissemination Framework) and WP5 (Impact Indicators Framework) we will also discuss how to increase the impact of their publication and research and introduce novel channels for dissemination appropriate for their setting. It is envisaged that we carry out two workshops in different European cities, to reach as many different researchers as possible.

Conferences

OpenUP will organise two major conferences. These will address all relevant actors, with an emphasis on Open Science. Both conferences, but especially the first one, will include a “solutions seeking and

providing session”, which will be organised in an interactive format. The conference will host a session on “Measuring the societal impact of science”.

- The first conference aim is to set the scene and make the project and its objectives known. It will seek to collect requirements related to the three OpenUP pillars. It will also include a dedicated session for a first validation of input and requirements.
- The final event will present the project outcomes (policy recommendations, practitioner guidelines, RRI Information Hub) and proposed sustainability measures.

Training material & coaching video series

Coaching video series on impact indicators The results of WP5 (Impact Indicators Framework) will be used to produce a video series about the use of altmetrics and traditional indicators. The video series will be based on the Taxonomy of channels of dissemination and altmetrics indicators. The video series will consist of short (max 15 minutes), didactic video lectures aimed at beginner to intermediate level and cover potentials and pitfalls as well as starting points where to find further material and software solutions. To further promote openness and transparency videos will aim to promote Open Source software solutions. This activity will also be used to promote the taxonomy among academia and practitioners.

5.3.2. Participation in third party activities

Participation in external events

Proactive participation in third party events and exhibitions. Liaise with ongoing or emerging initiatives for the co-organization or participation in OpenUP planned or related events. A shared event list with all Consortium members will be created and will be used as an observatory of international events related to Open Science and the three pillars of OpenUP subjects. This list will not only serve informative but organisational purposes as well, as that the Consortium members will mark in which events they will participate.

Synergies with other projects

Liaison with related initiatives. Partners have already identified additional initiatives for potential collaboration (e.g. LIBER, Young European Associated Researchers, la Caixa Foundation, OpenAIRE, FOSTER, Open Knowledge, RRI-ICT project), several of them already expressed interest in this collaboration, as it is stated in supporting letters they provided.

6. Assessment & KPIs

To secure continuity and effectiveness of the impact of the project, OpenUP has established a coherent assessment plan by which all aspects of the dissemination activities are managed and measured. This plan that covers all activities of the dissemination activities, consists in two types of indicators: (i) specific quantitative metrics with a numerical target and (ii) qualitative measures to be used as monitoring indicators of the purposed methods and tools (e.g. Interaction with external initiatives). These assessment measures will set the prerequisites of the quality of the dissemination results and will help OpenUP partners to assess the performance of the dissemination activities. Hence, it will help monitoring and calibrating the related processes, transfer those prerequisites from individual assignments to overall results, and thereby essentially contribute to the sustainable success of the project.

Table 6: Quantitative & quantitative impact indicators
Relevant Communication Measures & Indicators & Targets
Goals

OpenUP branding & communication material, channels	
Develop project logo, key messages, motto line, online & printed identity	1 project logo (various resolutions) 1 project motto in all key languages 2-5 hashtags to use when disseminating through social media 1 PPT & 1 document template
Set up project communication channels	1 project web site 5 Project social accounts: Twitter, Facebook, LinkedIn, YouTube channel for videos, SlideShare for PPTs Impact of website and Open Science Hub (average number of hits >2, >2000 unique visitors, average length of stay >1,5 minutes through web statistic module)
Develop communication guidelines & good practices for project dissemination activities	3 factsheets explaining communication strategy, how to use key messages, how to harmonise talking/presenting, how to use own social media for project dissemination 2 guidelines for documenting & reporting project dissemination activities 1 statement templates for acknowledging EC funding
Produce printed project brochures, flyers, posters, how-to guides	1,000 project flyers in English 10 project posters in English
Produce digital project brochures, banners, buttons, how-to guides	5 digital project flyers/brochures (e.g. using SMORE) 5 project banners in all key languages
Produce training material & coaching video series	>150 views
OpenUP campaigns	
Social media campaigns	2 around the project per year around relevant events 1 per use case per year around relevant milestones (e.g. demo deployment) or events (e.g. major conference) 1 on open data for sustainability & social innovation Impact of social media & engagement metrics (>250 followers, >100 referrals – content retweets & sharing, >100 likes, etc. through social media dashboards)
Campaigns for outreach to general press and media	3 press releases per year on project stories & outcomes

Relevant Communication Measures & Goals

Indicators & Targets

	2 interviews with local community members per year explaining open science stories & successes in simple language (to disseminate through various channels)
Promotion of targeted news items for scientists & experts via specialised channels	>10 news items per year on specialised project topics (through existing channels & newsletters)
Acknowledgment from the community	Interaction with external initiatives (European & Non-European) Acceptance of the project findings from the user communities
Outreach of policy & decision makers informing about project activities, outcomes, successes, societal impact	1 briefing memo per year informing scientific communities
	1 briefing memo per year informing funding agencies & donors (e.g. project officers, unit directors)
	1 briefing memo for national/regional government officials (scientific advisors, officials in Ministries of Science & Technology, etc.)
OpenUP scientific outreach	
Publication of scientific papers in journals or conferences	>3 publications to journals relevant to open science and possibly to each of the use cases presenting project outcomes >1 publication to journals related to Computer Science and Information Science topics >2 publications to Computer Science and Information Science conferences >2 publications to journals related to social sciences >2 publications to social science conferences
Organisation of special sessions or workshops in scientific conferences	1 special session or workshop per year in a highly visible or relevant conference
	1 special session or workshop per year at relevant IT in social sciences
	>100 of attendees proceeded in OpenUP events >2 of organisations attending in OpenUP events >2 of European 3 rd party projects involved OpenUP activities
	Successful participation and attendee satisfaction
Preparation of articles in general science communication & publication outlets	2 articles per year at related blogs and websites
OpenUP business outreach	
Promoting OpenUP achievements via business partners web sites	Create more than 5 entries in organisation’s News section of the web site
Meetings with Business Units/Commercial Staff from commercial partners	At least 3 during the projects lifetime

Relevant Communication Measures & Goals

Indicators & Targets

Demonstrations of the OpenUP recommendations and offering at funders and policy makers-dominated event	At least at 2 related events during the projects lifetime
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7. Expected impact

OpenUP's goal is to build an advanced and shared knowledge-base and collaborative network that will support the transformation towards better and more **open science and scholarship within and outside European borders**. OpenUP dissemination activities will support these activities and as a result, a significant impact on several sectors and layers is expected. Academic communities, researchers, publishers, funders, but also the general public will significantly benefit. OpenUP dissemination and outreach will also assist in leveraging the defragmentation of European cultural and science policies. In the following, we summarize the major expected impacts of OpenUP dissemination strategy.

- **An open dialogue** among all stakeholders
- **Set up various communication channels**, to reach all parties that are important **for/to** the project and the scholar community.
- **Increase interactions** and support coordination and communication among key stakeholders
- **Raise awareness** on review-dissemination-impact issues
- **Train** the target communities in innovative ways of dissemination, impact assessment and peer review issues
- Contribute to a more **open science environment** and the optimal **circulation of knowledge within the ERA** (European Research Area).
- Development of more **gender sensitive** ways of conducting research and fostering innovation.
- **Involve Open Science networks and communities** in the project activities, social networks and communities.
- **Increase visibility** of affiliated initiatives.
- Turn OpenUP RRI Hub to a **self-sustainable** infrastructure that will be visible even after the project's lifetime. RRI Hub will be the reference center towards open tools/services, methodologies, best practices, success stories and reports.
- **Policy recommendations and guidelines** to be used by EU, national and institutional policymakers at different settings.