

Interreg
Alpine Space



**CARE4TECH Landscape of
potential Leading Alliances on
Smart Living: AS Knowledge Atlas
Relation Management Tool,
D.T1.3.2**



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RE	Restricted to a group specified by the consortium	
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1 EXECUTIVE SUMMARY

1.1 PROJECT OVERVIEW

The Alpine Space arena is becoming a leading destination for technology providers in the area of Smart Living, but is hindered by fragmentation in the research and innovation landscape, which prevents the transnational region from becoming the center of European excellence. CARE4TECH looks to bridge the gap in this fragmented landscape, by generating a coordinated approach to Smart Living technology development. CARE4TECH focuses on creating and maintaining strong ties between quadruple-helix actors; what this means in practice is creating structures that improve the communication and transparency between research institutions, businesses, government, and civil society as a whole. By improving these ties, the project aims to align policy development with real civil and market drivers.

1.2 MAIN PROJECT RESULTS ARE:

- Alpine Space KNOWLEDGE ATLAS - Map of leading cases and approaches classified in a Knowledge Atlas,
- Alpine Space ALLIANCES - Thematic excellences grouped to cooperate,
- Alpine Space TASK FORCES and ALPINE CAMPUS- Supported by quadruple helix based teams to jointly learn and innovate through a living lab based learning system and
- Alpine Space THINK TANK - Set up of a permanent policy and stakeholder’s platform linked to EU initiatives to fully exploit outputs and their technological strategic potential.

1.3 WORK PACKAGE OVERVIEW

Work Package 1 (WPT1) is the first content step in CARE4TECH, and aims to create a common knowledge base (or KNOWLEDGE ATLAS) for all members of the project partnership and their stakeholders related to the topic of Smart Living. WPT1 characterized by data gathering and the generation of knowledge sharing structures. The identification of leading Alliances on Smart Living and the definition of the preconditions for their constitution is a crucial step in the representation of these common working procedures.

1.4 ADDITIONAL COMPONENTS TO THE VISUAL MATRIX OVERVIEW

The main relevant findings from the mapping and classification activities that have led to the creation of the AS Knowledge Atlas, were uploaded in the Visual Matrix, developed in the early stages of the project (see D.T1.2.1 for more details about the Visual Matrix). Starting from a list of repeatable case studies, which represent a first hub, partners have identified potential technologically leading Alliances on Smart Living, according to the 10 pre-defined Smart Living topics which emerged as relevant for their region.

Since the identification of leading Thematic Alliances and the definition of the preconditions for their constitution is a crucial step, a Checklist was developed to pre-assess the feasibility of the Thematic Alliances and to understand if the Partnership is progressing with the correct Alliance (see D.T1.3.1 for more details about the Checklist).

Additional components of the Visual Matrix have been considered essential to describe the generated Thematic Alliances. In particular, it was considered worthwhile to identify one specific tool to describe their relevance for the AS area, the preconditions for their constitution and the potential mid and long term perspectives.

After an overview of the main available tools, it was agreed with the project partners to use “Trello”, an efficient collaboration tool that can be exploited during the whole project duration by the involved stakeholders as a sort of one-stop-shop, to monitor the state of the heart of each Thematic Alliances, to be updated on strategic developments and to let the actors collaborating toward future perspectives.

2 INTRODUCTION

The purpose of this document is to provide the CARE4TECH Project Partners with a guide on the initial Alliance development activity and how to exploit the “Trello Board” to support the description and the implementation of the specific Thematic Alliances to each topic generated from the Visual Matrix’s visualization.

In particular, a first section (chapter 3.1) is dedicated to the clarification of the establishing Alliances’ topics and the working groups that will be the basis of the Task Forces. According to this, the initial Alliance development activity has been summarized according to the output of the Checklist summary work. In D.T1.3.1 indeed, topics were identified, and partners asked to develop their concept in a series of questions to test the relevance of the topic and the potential involvement of the quadruple helix stakeholders.

Then, a second section (Chapter 3.2) is related to the implementation of the Alliance into a proper relation management tool. Partners are thus asked to solidify the gathered Alliance information into a transparent board, where new users could be incorporated into the Alliance development.

After an overview of the main available tools, it was agreed with the project partners to use “Trello”. It is a collaboration tool that allows partners to organize and manage the Alliances into smart boards. At one glance, using Trello, the stakeholders will be able to figure out the Alliance overview, with the descriptions and relevance, the related Task Force composition, with all the people involved and working into the Alliance (the Leaders, Supporters, Mentors and Peer Reviewers), and the relevant Case Studies.

The “Smart X Trello Board” will be also directly linked to the Visual Matrix and Moodle platform. In this way, it will act as a sort of one-stop-shop, a place where all the involved stakeholders can monitor the state of the art of each Thematic Alliances, be updated on strategic developments and collaborate toward future mid and long term perspectives.

In particular, every Thematic Alliance must have a specific “Smart X Trello Board” with dedicated Lists, according to the main tasks (Overview, Task Force, Case Studies, perspectives, ...) that will be fulfilled with cards. Annex X shows the overall layout of the “Smart Workplace Trello Board”. È

2.1 CONNECTION TO OTHER WORK PACKAGES

This methodology is a required activity under Work Package T1 (“WPT1”): Know! Improving Common Knowledge Base, and in particular under Activity A.T1.3 “Identify potential technologically leading Alliances on Smart Living and define preconditions for their constitution”, which aims at setting the foundation for the AS Knowledge Atlas. This activity “Landscape of potential leading Alliances on Smart Living” has the main scope of introducing a relation management tool, an additional component to the Visual Matrix, in order to provide a comprehensive instrument able to support the involved stakeholders in managing and implementing the Alliance.

This activity will support the formation of the Alliances in WPT2 and becomes the basis around which the project partners will interact and cooperate throughout the lifecycle of the project. On one hand, the Alliance Checklist will be the first step to developing the AS Task Forces, which is a mixture of the internal and external working group on these topics. The activity generally builds off the work that was done in AT1.1 and AT1.2, during the knowledge gathering phase of the project. On the other hand, the relation management tool will be the place where all the information will be collected and where stakeholders will be able to interact, manage and monitor the activities within a specific Alliance. The management tool will also be the reference for the AS Alpine Campus activities, in particular for the Alliance implementation, foreseen in WPT2. Indeed,

the Leaders will be able to exploit this one-stop-shop environment to design, formalize and run the AS Alliances. In addition, this activity will also set up the basis for the implementation of the AS Think Tank foreseen in WP T3. In particular, the relation management tool, Trello, together with the other identified tools (Slack, Skype), will foster the preparation and organization of a permanent stakeholder dialogue process (A.T3.1) involving the identified stakeholders and integrating them into the AS innovation landscape at all levels.

2.2 CALL TO ACTION

Each Alliance Leader is required to complete the “Smart X Trello Board”, with re specific lists and cards, by the **5th of December 2017**.

Each “Smart X Trello Board” will be then updated regularly by Alliance Leader and Support according to the foreseen activities.

3 METHODOLOGY:

The main relevant findings from the mapping and classification activities that have led to the creation of the AS Knowledge Atlas, were uploaded in the Visual Matrix, developed in the early stages of the project (see D.T1.2.1 for more details about the Visual Matrix). Starting from a list of repeatable case studies, which represent a first hub, partners have identified potential technologically leading Alliances on Smart Living, according to the 10 pre-defined Smart Living topics which emerged as relevant for their region. In particular, an Alliance has been defined in previous deliverables as “a thematic area around which the project group will develop common cooperation activities, with a goal to share amongst stakeholders, analyse common problems, develop common solutions, and identify policy-docking point”. The Alliance has the goal to reduce the fragmentation of activity that current exists in the Alpine Space related to Smart Living, provide policy recommendations on how to further connect and link stakeholders, and generate immediate and strategic solutions for all quadruple helix involved.

3.1 DEVELOPMENT FROM THE ALLIANCE CHECKLIST

Since the identification of leading Alliances on Smart Living and the definition of the preconditions for their constitution is a crucial step, a Checklist was developed to understand if the partnership is progressing with the correct Alliances which will lead to fruitful cooperation and effective technical collaboration and policy recommendations in WPT2 and WPT3 (see D.T1.3.1 for more details about the Checklist).

An overall summary of the final Alliance topics & the associated Alliance Working Groups which were created can be found in the Appendix of this document. (Annex 6.2).

3.2 RELATION MANAGEMENT TOOL

A relation management tool has been considered essential to support the formation of the Alliances in WPT2, becoming the basis around which the partnerships together with all the involved stakeholders will interact and cooperate throughout the lifecycle of the project. It was considered worthwhile to identify one specific and, after an overview of the main available tools, Trello has been chosen by the project partners, since it has all the identified core functionalities which will be relevant for the purpose of the project activities. In particular, the main envisaged advantages of Trello are:

- It is free and can be used right away after signed up.
- It is very easy and clear to use.
- It is smart, looks like an App and can be used with any size of screen.
- Real time updates can be seen immediately.
- A board will be used for each of the Alliances and all the items can be seen on the same page.
- It is easy to add new members and assigned people to specific tasks.
- It is easy to upload Docs in several format (Word, PDF, Excel, ...).

Due to all the above-mentioned pros, the “Trello Board” is supposed to be an efficient collaboration tool that can be exploited during the whole project duration by the involved stakeholders as a sort of one-stop-shop, to monitor the state of the heart of each Thematic Alliances, to be updated on strategic developments and to let the actors collaborating toward future perspectives. The “Smart X Trello Board” will be the place where all the information will be collected and where stakeholders will be able to interact, manage and monitor the activities within a specific Alliance.

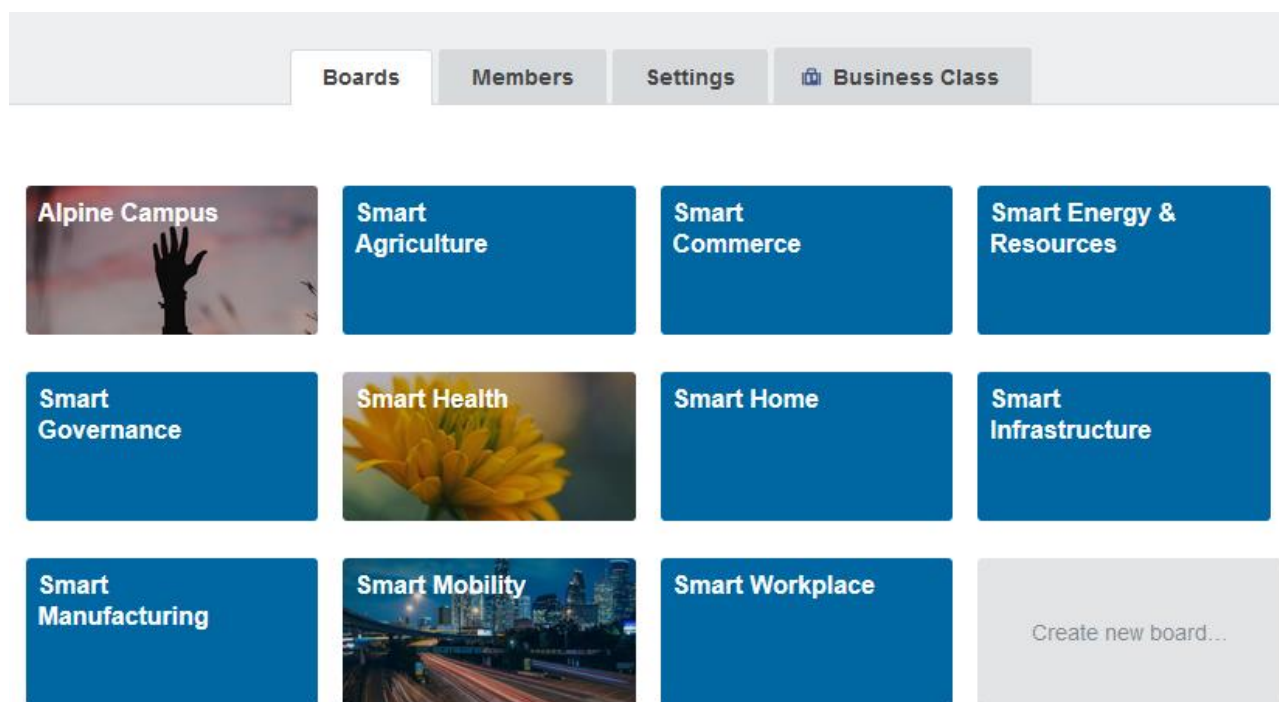
The draft “Smart Workplace Trello Board” can be found in the Appendix of this document.

The following activities are required by each Alliance Leader in order to create an effective “Smart X Trello Board”:

3.2.1 Create a board for each Alliance

After having signed in Trello, each Alliance Leader will find a specific board for the related Thematic Alliance, namely “Smart X”. (Note: an invitation from the CARE4TECH project should have been already sent and the 10 “Smart X Trello Boards” already set).

This board can be thought as a sort of one-stop-shop where all the key information is stored and where all the key relevant stakeholders can meet and cooperate.



3.2.2 Create specific lists

Inside the “Smart X” board partners should be able to create Lists according to the main foreseen tasks (Overview, Task Force, Case Studies, perspectives, ...) that will be fulfilled with cards. Annex X shows the overall layout of the “Smart Workplace Trello Board”.

In particular, the following lists should be created (Alliance Leaders are free to create and adapt lists and cards according to the Alliance activities):

1. Overview of Smart X.

This list gives an overview of the Thematic Alliance, specifying characteristics, objectives and relevance within the Alpine Space area.

In particular, the list should include the following cards:

- The definition of the Alliance
The Partner is asked to provide a definition for this Alliance Topic.
- The relevance for the Alpine Space Area
The Partner is asked to provide a brief summary on why the sub-topic is relevant for the Alpine Space Area.
- Link to the Moodle Platform

The Partner is asked to provide the link to the Moodle Platform related to the specific Alliance.

- Link to the AS Knowledge Atlas

The Partner is asked to provide the link to the AS Knowledge Atlas related to the specific Alliance.

2. AS Task Force

This list includes digitalised factsheet of the AS Task Force, which gather all the main information and references of the Task Force involved in the Alliance. This factsheet will be developed across the project, but the first stage will be to create a profile of the Alliance Lead and Support, along with a more detailed profile of the AS Peer Reviewers and AS Mentors for your organisation's selected Alliance.

In particular, the list should include the following cards:

- Alliance Leader

The Partner is asked to provide main information on the Alliance Leader (logo, address, contacts, and brief description).

- Alliance Support

The Partner is asked to provide main information on the Alliance Support (logo, address, contacts, and brief description).

- Alliance Mentors

The Partner is asked to provide main information on the Alliance Mentors (Reference info, key qualifications, and key references) uploading Experts Factsheets.

- Alliance Peer Reviewers

The Partner is asked to provide main information on the Alliance Peer Reviewers (Reference info, key qualifications, and key references).

3. Case Studies

This list includes some relevant existing case studies which have been considered relevant for the Alliance.

In particular, the list should include a card for each specific case study. At least one existing one case study related to the Alliance topic should be reported.

4. Mid and long-term perspectives

This section refers to the activities foreseen in WP T3 on the design, formalize and run of the AS Alliances. In particular, this list should include the following card:

- Smart X Handbook

The Partner is asked to upload the report on designing & implementing the Alliance (a template will be provided in D.T2.1.1)

- Smart X Roadmap

The Partner is asked to upload the roadmap for future excellence in technology and innovation (a template will be provided in D.T2.1.2) and roadmaps implementation reports (a template will be provided in D.T2.1.5)

5. Other Lists.

6. This section refers to additional inputs & information that can help to fully support any Alliance Member to further understand, develop and implement the topic at any relevant level. For instance:

- a. Relevant events & conferences

- b. Complementary Transnational Projects
- c. Most relevant working groups & networks

3.3 CALL TO ACTION

Each Alliance Leader is required to complete the “Smart X Trello Board”, with re specific lists and cards, by the **5th of December 2017**.

Each “Smart X Trello Board” will be then updated regularly by Alliance Leader and Support according to the foreseen activities.

In order to create a complete effective “Smart X Trello Board”, the following activities are requested from each Alliance Leader:

Required Output	No. of Outputs	Required Delivery Date
Register to the Project’s Trello Account (Module 1 – P2 Manage (Task Force))	1	18 September 2017
Complete your Alliance Topic’s Brochure as a part of the Alliance Info Folder (Module 1 –P1 Summarize)	1 per PP	16 October 2017
Complete your Alliance Topic’s Checklist, as a part of the Alliance Info Folder (Module 1 – P1 Summarize)	1 per PP	16 October 2017
Complete your Alliance Topic’s SWOT analysis, with the help of your Alliance Support (Module 1 –P1 Summarize)	1 per PP	16 October 2017
Identify your organisation’s mentor (at least 1 per pp), and provide profile of their expertise in Trello (Module 1 – P2 Manage (Task Force))	1 per PP	17 November 2017
Write out the full profile of your AS Task Force for your Alliance Lead topic on Trello (Module 1 – P2 Manage (Task Force))	1 per PP	17 November 2017
Organise, deliver and record one in-country mobility action, to share knowledge and gather new information about your AS Alliance Lead Topic (Module 1 – P4 Exchange)	1 per PP	17 November 2017

4 IMPACT CONTROLLING PROCEDURE

The Impact controlling related to the AS Knowledge Atlas Relation Management Tool is a global task of assuring that all AS Alliance Lead and Support gather appropriate information to support the development of the AS Task Force Fact Sheet in Trello. Partners should be able to assure that they have created 1 “Smart X board” in Trello per Alliance, where Peer Reviewers can find all necessary information to see how the CARE4TECH Outputs are being implemented through the support of the identified tools (Trello, Slack, Skype) and how a strong network of competent Partners & Stakeholders is cooperating.

5 CONCLUSIONS

The purpose of this document is to provide the CARE4TECH Project Partners with a guide on the initial Alliance development activity and how to exploit the “Trello Board” to support the description and the

implementation of the specific Thematic Alliances to each topic generated from the Visual Matrix's visualization.

In particular, after the clarification of the establishing Alliances' topics and the working groups that will be the basis of the Task Forces, the activities focus is on the implementation of the Alliance into a proper relation management tool.

"Trello" has been addressed by the project partners as an efficient collaboration tool that can be used during the whole project duration as an additional component to the Visual Matrix in order to describe the 10 identified Thematic Alliances. In particular, each "Smart X Trello Board" can be exploited by the involved stakeholders as a sort of one-stop-shop, to monitor the state of the heart of the Thematic Alliances, to be updated on strategic developments and to let the actors collaborating toward future perspectives.

Alliance Leaders are asked to complete the "Smart X Trello Board" **by the 5th of December 2017** for their Thematic Alliance following the given instructions and according to their activities.

6 ANNEXES

6.1 SMART WORKPLACE TRELLO BOARD

