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# **Draft Project plan for the CEN Workshop on " Guidelines on Action Research for Large Scale Piloting"**

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**Requests to participate in the Workshop  
and/or comments on the project plan are  
to be submitted by  
10<sup>th</sup> July 2023 to  
madlen.schmudde@din.de<sup>1</sup>**

Recipients of this project plan are kindly requested to name all patent rights known to them to be relevant to the Workshop and to make available all supporting documents.

**Berlin, 05<sup>th</sup> June 2023 (Version 1.0)**

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<sup>1</sup> Applications for participating in the Workshop and comments on the project plan that are not received by the deadline do not need to be taken into consideration. Once constituted, the Workshop will decide whether or not to consider the comments received in good time.

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## Summary

Action Research is a methodology in which stakeholders of a research project become co-researchers. The research is conducted in an iterative way and aims to make a change in practice, while also extending scientific knowledge. This way of working guarantees active involvement of stakeholders throughout the research process and makes sure that their opinion is taken into account. Therefore, Action Research and other participatory research methods are increasingly used to ensure a good fit between research and practice. However, for researchers who are inexperienced with such participatory approaches it can be difficult to properly set up and conduct an Action Research project, especially when working on a large scale. The guidelines proposed in this CWA are meant to help researchers solve these difficulties, and at the same time help align different Action Research efforts so that conclusions can be drawn on a higher level.

## 1 Status of the project plan

**Draft project plan** for public commenting (Version 1.0)

This draft project plan is intended to inform the public of a new Workshop. Any interested party can take part in this Workshop and/or comment on this draft project plan. Please send any requests to participate or comments by e-mail to [madlen.schmudde@din.de](mailto:madlen.schmudde@din.de).

All those who have applied for participation or have commented on the project plan by the deadline will be invited to the kick-off meeting of the Workshop on **17<sup>th</sup> July 2023**.

## 2 Workshop proposer and Workshop participants

### 2.1 Workshop proposer

Person or organisation	Short description and interest in the subject
Kira Oberschmidt Roessingh Research and Development B.V. Email: <a href="mailto:K.Oberschmidt@rrd.nl">K.Oberschmidt@rrd.nl</a> Phone: 003188 087 5767 Webpage: <a href="http://www.rrd.nl/en/">http://www.rrd.nl/en/</a>	Kira Oberschmidt is a PhD candidate at Roessingh Research and Development and the University of Twente in the Netherlands. The focus of her research is on the processes of active stakeholder involvement in eHealth research through Action Research. She coordinates the activities related to Action Research in the Pharaon project and leads the effort for writing the deliverable about this work (D7.3.) which will form the basis for this CWA.

### 2.2 Other potential participants

This CWA will be developed in a Workshop (temporary body) that is open to any interested party. The participation of other experts would be helpful and is desired. It is recommended that:

- Researchers with a focus on participatory research
- Citizens with an interest in research participation
- Coordinators of large scale research projects

take part in the development of this CWA.

## 2.3 Participants at the kick-off meeting

The following persons or organisations already signed up to the kick-off meeting prior to the publication of the draft project plan.

Person	Organisation
Workshop proposer: Kira Oberschmidt	Roessingh Research and Development B.V.
Andreja Kutnar	InnoRenew CoE Center
Angelique Tinga	University Twente
Christiane Grünloh	Roessingh Research and Development B.V
Damir Haskovic	MINDS & SPARKS GmbH
Elisabete Pitarma	Caritas Diocesana de Coimbra
Erika Rovini	University of Florence
Eva Siderakis	Stichting Nationaal Ouderenfonds
Fabio Guasconi	UNINFO Associazione
Filippo Cavallo	University of Florence
Francesco Giuliani	Fondazione Casa Sollievo della Sofferenza
Francisco Melero	Asociacion Empresarial De Investigacion Centro Tecnologico Del Muebley La Madera De La Region De Murcia
Gianna Vignani	Umana Persone Impresa Sociale R&S
Laura Fiorini	University of Florence
Lennart van Vulpen	Stichting Nationaal Ouderenfonds
Letizia Lorusso	Fondazione Casa Sollievo della Sofferenza
Maria del Pilar López Acuña	Fundación Formación e Investigación Sanitaria
Maria Párraga	Fundación Ageing Social Lab
Mariana Camacho	Irmandade Da Santa Casa da Misericordia da Amadora IPSS
Matthias Pocs	Stelar Security Technology Law Research

Michael Mrissa	InnoRenew CoE Center
Roberto Scano	UNINFO Associazione
Roland Reiter	MINDS & SPARKS GmbH
Victoria Bueno	Universidad Politécnica de Cartagena
Workshop secretariat: Madlen Schmudde	Workshop secretariat: DIN E. V.

### 3 Workshop objectives and scope

#### 3.1 Background

A lot of R&I projects include Action Research for pilots within their work program but a common way on how to best collect and exploit data to facilitate their replicability and how to ensure the reproducibility of methodologies for validation across pilots is still missing. By developing this CWA the workshop tackles this issue and shares lessons learned as well as best practices from the Pharaon project. Within this CWA also validated and standardized methods and questionnaires for Action Research for large scale pilots will be shared. That way, the CWA “Guidelines on Action Research for Large Scale Piloting” will help other research organisations and future projects to properly conduct Action Research.

#### 3.2 Scope

The planned Workshop will define Action Research and its role in large scale pilots. It will identify the key stakeholders involved and outline the necessary steps to conduct Action Research including planning, pre-validation, deployment, data collection and analysis. This workshop will provide guidance on ethical consideration as well as addressing challenges and solutions like managing data, communication and collaboration among stakeholders. It will specify ways to ensure the sustainability and scalability of the Action Research outcomes. Key competencies and skills researchers and other stakeholders need to conduct Action Research will be outlined. The planned workshop will establish a framework for the identification of opportunities for future research and collaboration in this area. This planned workshop is intended to mainly be used by researchers and pilot managers, but can also be useful to other involved stakeholders like health and care providers, ethics boards and technology providers.

#### 3.3 Related activities

The subject of the planned CWA is not at present the subject of a standard. No committees, standards and/or other technical specifications that deal with related subjects were identified.

### 4 Workshop programme

#### 4.1 General

The kick-off meeting is planned to take place on 17<sup>th</sup> July 2023 virtually. A draft for public commenting will not be published.

A total of 8 Workshop meetings (kick-off meeting and Workshop meetings) and web conferences will be held, during which the content of the CWA(s) will be presented, discussed and approved.

The CWA will be drawn up in **English** (language of meetings, minutes, etc.). The CWA will be written in **English**.

#### 4.2 Workshop schedule

Table 1: Workshop schedule (preliminary)

CEN/CENEL EC Workshop	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2023	Apr 2024	May 2024	Jun 2024
<b>Initiation</b>														
1. Proposal form submission and														
2. Project plan development														
3. Open commenting														
<b>Operation</b>														
4. Kick-off meeting														
5. CWA(s) development														
6. Open commenting														
7. CWA(s) finalised and														
<b>Publication</b>														
8. CWA(s) publication														
<b>Dissemination</b>														
<b>Milestones</b>														

- K** Kick-off
- V** Virtual Workshop meeting
- A** Adoption of CWA
- P** Publication of CWA

### 4.3 Work already delivered

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## 5 Resource planning

The administrative costs of the CEN Workshop will be covered by the PHArA-ON (Pilots for Healthy and Active Ageing) project, which received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 857188.

All costs related to the participation of interested parties in the Workshop's activities have to be borne by themselves. The PHArA-ON project aims to reach an agreement with CEN CENELEC Management Centre to make the CWA freely downloadable from the CEN Website. The copyright of the final CEN Workshop Agreement will be at CEN. The final document will include the following paragraph: "Results incorporated in this CEN Workshop Agreement received funding from the European Union's HORIZON 2020 research and innovation programme under grant agreement number 857188 (PHArA-ON)".

## 6 Workshop structure and rules of cooperation

### 6.1 Participation in the Workshop

The Workshop will be constituted during the course of the kick-off meeting. By approving this project plan, the interested parties declare their willingness to participate in the Workshop and will be formally named as Workshop participants, with the associated rights and duties. Participants at the kick-off meeting who do not approve the project plan are not given the status of a Workshop participant and are thus excluded from further decisions made during the kick-off meeting and from any other decisions regarding the Workshop.

As a rule, the request to participate in the Workshop is closed once it is constituted. The current Workshop participants shall decide whether any additional members will be accepted or not.

Any new participant in the Workshop at a later date is decided on by the participants making up the Workshop at that time. It is particularly important to consider these aspects:

- a. expansion would be conducive to shortening the duration of the Workshop or to avoiding or averting an impending delay in the planned duration of the Workshop;
- b. the expansion would not result in the Workshop taking longer to complete;
- c. the new Workshop participant would not address any new or complementary issues beyond the scope defined and approved in the project plan;
- d. the new Workshop participant would bring complementary expertise into the Workshop in order to incorporate the latest scientific findings and state-of-the-art knowledge;
- e. the new Workshop participant would actively participate in the drafting of the manuscript by submitting concrete, not abstract, proposals and contributions;
- f. the new Workshop participant would ensure wider application of the CWA.

All Workshop participants who voted for the publication of the CWA or its draft will be named as authors in the European Foreword, including the organisations which they represent. All Workshop participants who voted against the publication of the CWA, or who have abstained, will not be named in the European Foreword.

### 6.2 Workshop responsibilities

The Workshop Chair is responsible for content management and any decision-making and voting procedures. The Workshop Chair is supported by the Workshop Vice-Chair and the responsible Workshop secretariat, whereby the Workshop secretariat will always remain neutral regarding the content of the CWA(s). Furthermore, the Workshop secretariat shall ensure that CEN-CENELEC's rules of procedure, rules of presentation, and the principles governing the publication of CWA(s) have been observed. Should a Workshop Chair no longer be able to carry out her/his duties, the Workshop secretariat shall initiate the election of a new Workshop Chair. The list below covers the main tasks of the Workshop Chair. It is not intended to be exhaustive.

- Content related contact point for the Workshop
- Presides at Workshop meetings
- Ensures that the development of the CWA respects the principles and content of the adopted project plan
- Manages the consensus building process, decides when the Workshop participants have reached agreement on the final CWA, on the basis of the comments received

- Ensures due information exchange with the Workshop secretariat
- Represents the Workshop and its results to exterior

The Workshop secretariat, provided by a CEN/CENELEC national member, is responsible for organising and leading the kick-off meeting, in consultation with the Workshop proposer. Further Workshop meetings and/or web conferences shall be organised by the Workshop secretariat in consultation with the Workshop Chair. The list below covers the main tasks of the Workshop secretariat. It is not intended to be exhaustive.

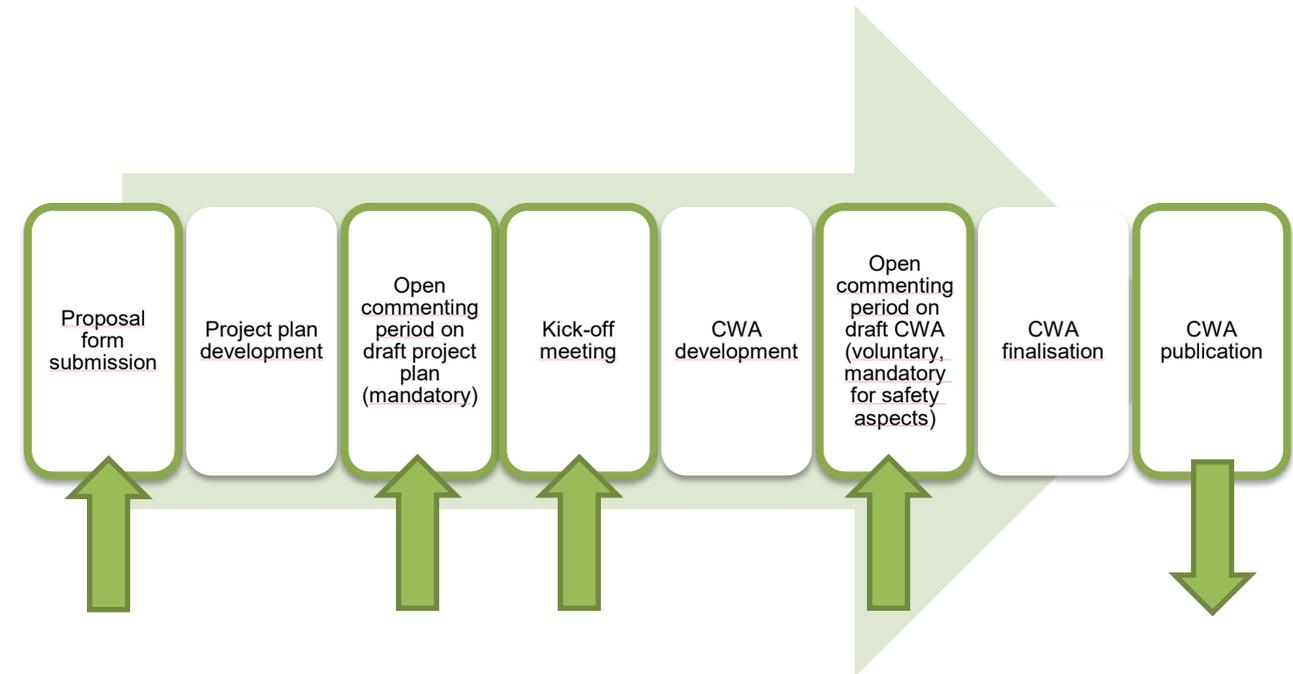
- Administrative and organisational contact point for the Workshop
- Ensures that the development of the CWA respects the principles and content of the adopted project plan and of the requirements of the CEN-CENELEC Guide 29
- Formally registers Workshop participants and maintains record of participating organisations and individuals
- Offers infrastructure and manage documents and their distribution through an electronic platform
- Prepares agenda and distribute information on meetings and meeting minutes as well as follow-up actions of the Workshop
- Initiates and manage CWA approval process upon decision by the Workshop Chair
- Interface with CEN-CENELEC Management Centre (CCMC) and Workshop Chair regarding strategic directions, problems arising, and external relationships
- Advises on CEN-CENELEC rules and bring any major problems encountered (if any) in the development of the CWA to the attention of CEN-CENELEC Management Centre (CCMC)
- Administrates the connection with relevant CEN or CENELEC/TCs

### **6.3 Decision making process**

Each Workshop participant is entitled to vote and has one vote. If an organisation sends several experts to the Workshop, that organisation has only one vote, regardless of how many Workshop participants it sends. Transferring voting rights to other Workshop participants is not permitted. During voting procedures, decisions are passed by simple majority; abstentions do not count.

If Workshop participants cannot be present in the meetings when the CWA or its draft is adopted, an alternative means of including them in the voting procedure shall be used.

## 7 Dissemination and participation strategy



### Open commenting period on draft project plan

In addition to the CCMC website, the project plan and the date of the kick-off meeting will be advertised on the website of the R&I project Pharaon as well as on the websites of DIN, Roessingh Research and Development B.V., AGE Platform Europe, UNINFO Associazione and Asociacion Empresarial De Investigacion Centro Tecnologico Del Muebley La Madera De La Region De Murcia to raise awareness. Interested parties are requested to contribute either through commenting of the project plan (short term) or through Workshop participation (long term).

### CWA publication

In addition to the CCMC website, the project plan and the date of the kick-off meeting will be advertised on the website of the R&I project Pharaon as well as on the websites of DIN, Roessingh Research and Development B.V., AGE Platform Europe, UNINFO Associazione and Asociacion Empresarial De Investigacion Centro Tecnologico Del Muebley La Madera De La Region De Murcia to raise awareness.

## 8 Contacts

- Workshop Secretariat:

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- CEN-CENELEC Management Centre

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- Workshop proposer

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