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Coaching Guidelines (R)

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Executive Summary

This deliverable presents the NGI_Trust Coaching Guidelines to support the third-party project coaches from Fraunhofer IAO, GEANT, Tecalia and KANTARA. The overall coaching goal is to support software developers in the implementation of successful trust and privacy management solutions by combining different aspects of usability, socio-economics and IT security. These coaching guidelines complement the online tool "NGI-Trust Tailored Software Interdisciplinary Development Assistance" of deliverable D3.2.

1 Introduction

1.1 Background / Deliverable Description

NGI_Trust supports third-party projects not only financially but also through extensive advice and monitoring. In connection with T3.4 of the NGI_Trust project each third-party project is entitled to receive three coaching sessions during the lifetime of the sub-project. According to the required expertise, NGI_Trust project partners and/or external experts will conduct the coaching.

To achieve this goal the following coaching guidelines shall support partners for providing effective coaching sessions. In addition, a briefing session will be provided to the coaches prior to beginning their assignment.

The standard assumption is that most coaching sessions will be organized as online meetings. However, it is possible that face-to-face meetings will be conducted occasionally during conferences and events.

1.2 Relation to other NGI_Trust deliverables

D3.4 should be understood as part of the NGI_Trust deliverables on technical third party coaching. Together with D3.2 "NGI-Trust Tailored Software Interdisciplinary Development Assistance" this deliverable thus forms the basis for the third party coaching activities in WP3, which will commence shortly (as of the completion of this deliverable). The outcomes of the coaching activities will be consolidated and presented in D3.6 "Summary of Coaching Reports" in M34.

2 Work done and current status

The following coaching guidelines shall not be descriptive regarding how the coaches should conduct their coaching sessions. All NGI_Trust coaches are highly experienced and know how to engage best with the third-party projects assigned to them. Therefore, the purpose of these coaching guidelines is rather to very



briefly establish common ground and to present coaches with a checklist on what aspects to consider when preparing their coaching sessions.

Central goals of the NGI_Trust coaching sessions are to ensure that third party projects:

1. Follow well defined procedures
 - 1.1. Structured approach
 - 1.2. Consideration of existing, related applications
 - 1.3. Interdisciplinarity (e.g., using experts)
2. Consider important aspects of IT security and data protection, e.g.
 - 2.1. Safety-oriented approach
 - 2.2. Consideration of Confidentiality
 - 2.3. Consideration of Integrity
 - 2.4. Consideration of Availability
 - 2.5. Consideration of Accountability
 - 2.6. Consideration of Transparency
 - 2.7. Consideration of Intervenability
3. Consider socio-economic aspects, including
 - 3.1. Product-oriented approach
 - 3.2. Cost/benefit aspects
 - 3.3. Different criteria for potential market success (e.g. competitors, timing, etc.)
 - 3.4. Possibilities for creating a product innovation (e.g. task technology fit)
4. Consider usability aspects, including
 - 4.1. User-oriented approach
 - 4.2. Usability standards
 - 4.3. User experience (positive/negative)
5. Take advantage of networking opportunities
 - 5.1. Consider networking options within the NGI family of projects

All coaches should ensure that they address these topics during their first coaching session with the third-party projects and identify the areas where third-party projects need additional support. Given that, NGI_Trust focus is on security and privacy oriented projects we expect that many projects will require additional support regarding points 3 and 4.

According to the train-the-trainer (TTT) methodology coaches should consider the following aspects when organizing their sessions:



1. Goals

The central goals of the coaching have been outlined above. In the first coaching session, the coach should use the opportunity to discuss with the participants their personal goals. It is very well possible that these goals are not aligned (e.g. from the perspective of the coach usability could be crucial, but from the point of view of the participant this might not be the case). In this case, the coach needs to find common ground trying to align the goals of the coaching with the goals of the participants. A good alignment is critically important to ensure that the participants remain motivated and engage with the coaching session.

Secondly, the coach should differentiate w.r.t to the type of desired outcomes. *Cognitive goals* (awareness) relate to knowledge and intellectual skills. *Affective goals* relate to a change of motivations, interests, and attitudes. *Psychometric goals* relate to movements, physical and perceptual abilities and are expected to be less relevant in the context of this project.

Having determined the course-grained targets (e.g. improve usability engineering in the project) the coach should decide on the fine-grained targets for the follow-up coaching sessions (e.g. "understand and learn to apply the 8 golden rules of interface design").

2. Content

Based on the identified goals the content to be covered in the coaching sessions should be determined. The first coaching session should be a general "check-up" and cover the content related to the overall coaching goals. In the follow-up sessions, content should be selected according to the identified needs. The NGI-Trust Tailored Software Interdisciplinary Development Assistance tool might be useful in order to browse possible content quickly. While selecting the more detailed content coaches should follow a MUST-SHOULD-CAN analysis to maintain some structure as well as flexibility in terms of what content "must" be covered, what content "should" be covered and what additional content "can" be covered if there is some extra time.

3. Methods and media

Given that most coaching sessions will be conducted online, the choice of methods and media will be restricted. Coaches are encouraged to make use of all the features available through online conferencing tools and keep the session as interactive as possible. Whenever possible, coaches should switch between active and passive learning modules and present the content in easy-to-digest elements.

Relevant questions to prepare for the session include:

How do I organize the session?



How do I convey content in an understandable way?

How do I achieve the teaching goals?

How do I prepare content?

Which media do I use?

How do I keep participants engaged?

How do I speak in an interesting and varied way?

How do I motivate participants?

4. Participants

Coaches should insist that all third-party team members are present during the coaching session, in order to take full advantage of the complementary skills and experiences of diverse team members and of interdisciplinary perspectives within teams. The coach should be prepared to adjust to the specific dynamics within the coached team.

Relevant questions to prepare for participants in the different teams include:

How do I create a good group atmosphere?

How do I design group processes?

How do I deal with conflicts and disturbances?

How do I give feedback?

How do I build a good relationship with participants?

What prior knowledge do the participants have?

What is the composition of the group? (Functions, Hierarchies, Age)

How do the participants relate to the topic (motivation)?

What are the participants' expectations and goals?

5. Feedback forms and Coaching reports

As critical input for deliverable 3.6 "Summary of Coaching Reports" all coaches are requested to collect feedback and provide a coaching report using the following templates which will be made available through appropriate tools e.g. online survey tools to collect feedback and the NGI_Trust WIKI for coaching reports.



NGI_TRUST Coaching feedback form

Date _____

Coach _____

Project _____

How would you rate overall quality of the coaching?

Excellent Good Fair

How well did you understand the objectives?

Excellent Good Fair

How well did the coaching accommodate your background and needs?

Excellent Good Fair

How satisfied are you with the progress achieved?

Excellent Good Fair

What was the most interesting thing you learned in your coaching sessions?

What was the least interesting thing you learned in your coaching sessions?



What would have made the sessions more effective?

Are the knowledge and skills gained from the program useful for your NGI_Trust funded project?

__ YES__ NO

If YES, then list one item from the coaching that made an impact on / improved your project results or product?



NGI_Trust Coaching Report

Third Party Project		Date of 2nd Coaching Session
Third Party Participants		
Coaches		Date of 3rd Coaching Session
Date of 1st coaching session		

Coaching session	Specific Areas to be improved	Actions to be taken	Timeframe for improvement	Examples / Documentation of Improvement	Progress Achieved (Y/N)	Comments
1						
2						
3						



In summary the main tasks for the three coaching sessions are:

Coaching session 1	Align goals with participants; assess motivation of participants; align course-grained coaching targets, define fine-grained coaching targets; the NGI-Trust Tailored Software Interdisciplinary Development Assistance tool can be used to quickly Identify a number of fine-grained targets. Collect feedback.
Coaching session 2	Call in experts (if required) to coach on fine-grained coaching targets in session 2. Evaluate whether coaching goals of session 1 have been achieved. Determine areas for further improvements and make recommendations. Collect feedback.
Coaching session 3	Evaluate whether the coaching goals have been achieved and collect final feedback. Evaluate progress regarding the concrete realization of the course- and fine-grained target goals in the third-party project; Determine areas for further improvements and make recommendations. Provide coaching report to NGI_Trust.

2.1 Methodology / Networking and collaboration

The NGI-Trust Coaching Guidelines are being made available to all NGI_Trust partners. The guidelines will be discussed in the initial briefing session for the coaches. Any open issues will be addressed and clarified at this point.

All coaches are requested to collect the feedback forms from each participant and to complete the NGI_Trust Coaching report template at the end of the three coaching sessions.

2.2 Results and discussion / Perspectives

The NGI-Trust Coaching Guidelines are now available for use within the NGI_Trust project. They should support coaches to help projects "think outside of the box" of software development and "inside new boxes" in terms of socio-economic impact and usability. The coaching sessions should support third party in designing a product or obtain a project results that fit market needs and will be highly attractive to end-users and prospective buyers. In this sense, the NGI_Trust Coaching Sessions fully support the NGI_Trust mission and help to enhance NGI_Trust impact.



2.3 Maintenance and/or next steps / roadmap

The NGI-Trust Coaching Guidelines will be maintained throughout the course of the project and further developed based on the input and feedback by NGI_Trust coaches, and from the third-party projects. The coaching reports will be documented in D3.6 "Summary of Coaching reports"

3 Conclusions

Projects Coaching is a central part of NGI_Trust activities. These coaching guidelines serve to establish "common ground" for all coaches and should help to collect structured feedback and coaching reports. We are now looking forward to creative coaching sessions that will be inspiring for both the participants from third-party projects and the NGI_Trust coaches.