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"Coastal erosion – Evaluation of the need for action"  
Directorate General Environment  
European Commission

# **Living with coastal erosion in Europe: Sand and Space for Sustainability**

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[\[Source Document\]](#)

## ***Manual of procedures for setting up Local Information Systems***

### **VOLUME I : MANAGEMENT PROCEDURES**

**Final version – May 10 2004**

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# Volume I

## Manual of procedures for setting up Local Information Systems





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# **INTRODUCTION**

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## 1. Objectives of the Manual of procedures for setting up a Local Information Systems

These generic guidelines are designed to be a kind of “reference document” for institutions willing to implement - or subscribe to - an Information System dedicated to:

- i. Support the policy preparation, implementation and evaluation (whole cycle) through the improvement of the availability, accessibility and mutual exchange of (digital) information between involved institutions or stakeholders. This information can be very heterogeneous, including documents, datasets, maps, pictures on digital format.
- ii. Improve public participation, including execution of feasibility studies, impact assessment prior to policy developments, or monitoring. The guidelines aim at providing detailed and practical information based on the experience and lessons learnt from EUROSION.

The access to adequate timely reliable information is an efficient element. However these guidelines have a broader scope, covering more than the coastal sector. The main project in which the guidelines are being realised, EUROSION, has Integrated Coastal Zone Management (ICZM) and in particular sustainable coastal erosion management as main focus.

The generic guidelines are divided into two parts:

Volume I – Manual of procedures for setting up a Local Information System (LIS)

Volume II – Technical specifications for prototyping an Internet-based application

This **first volume** of the guidelines will give an exhaustive and detailed outline of all potential steps, conditions and procedures needed for a local to national institution willing to improve the role information plays in the broadest sense of the word.

This includes the setting up and maintaining of a LIS at the level of its region, county, or municipality.

Setting up a Local Information System requires a number of steps that the guidelines detail. It aims to contribute to coherence and homogeneity of the different LIS that will be implemented in Europe, in terms of procedures, tools, methodology, and control means for each activity.

These guidelines are generic. This means that they are

a: Applicable at various sectors related to the field of Coastal Management (Spatial planning (e.g. framework and management plans), Environmental risk prevention and mitigation, Nature conservation (e.g. natural reserves), Civil protection, Water quality, Environment impact assessment legislation etc.) and their respective levels of operating (from sub-national to national).

b: Extremely exhaustive and detailed. It aims to be covering all aspects of the implementation of the LIS. This can cause doublings with other information systems. A huge amount of information systems are in fact already existing and actually being adopted by in the responsible authorities and their related stakeholders. Therefore, each reader/user can select the relevant items in the guidelines and adapt these to the required conditions appropriate for that situation.

The second volume of the guidelines aims at describing the technical specifications of the future Internet-based prototype application (so-called “LIS prototype”). This prototype will constitute the model application from which real LIS will be adapted and, as such, will contain the basic features expected to be common to all of these LIS. The second volume should be considered as Terms of Reference that an IT developer will be assigned to implement.

## 2. Domain of application

The procedures described in this first volume include all the steps toward the operation of the LIS:

- a. Feasibility and pre-design study
- b. Implementation
- c. Management and maintenance

## 3. Volume I Structure

Introduction	
I.1.	Feasibility and pre-design study
I.1.1.	Designation/recruitment of a LIS project manager
I.1.2.	User need requirement survey
I.1.3.	Inventory of existing sources of information available at the local level
I.1.4.	Elaboration of specific technical specifications for the LIS
I.1.5.	Assessment of implementation costs
I.2.	Implementation
I.2.1.	Kick-off meeting with all stakeholders
I.2.2.	Adaptation of EUROSION prototype to match the requirements of the feasibility and
I.2.3.	Implementation and test phase
I.2.4.	Training
I.2.5.	Marketing
I.3.	Management and maintenance
I.3.1.	Submission and resignation procedures
I.3.2.	Arbitration procedures in case of a conflict
I.3.3.	Annual budget planning procedures
I.3.4.	Access rights management procedures
I.3.5.	Forum management procedures
I.3.6.	Data quality control procedures
I.3.7.	Training procedures
I.3.8.	Documentation procedures

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1.	Annex I.1.1 Competence matrix
2.	Annex I.1.2.3 : Information diagram
3.	Annex I.1.2.6 : LIS survey
4.	Annex I.1.3: Existing information survey
5.	Annex I.1.3bis: List of key words
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17.	Annex I.3.81 User Satisfaction Survey
18.	Annex I.3.83 LIS Performance Report

#### 4. Guideline Adaptation to local specificities

The Manual of procedures for setting up a Local Information System is a generic manual. It has to be adapted to the specificities of particular local sites.

The manual of procedures encompasses mandatory procedures and optional procedures. Those optional procedures can be used or not, in order to adapt the guidelines to one LIS specificities.

#### 5. Terminology

##### a. Definition of an information system

Within the framework of EUROSION, an information system is defined as “a set of technological, human, organisational, financial, and information resources organized in such a way to produce, archive, retrieve, modify, process, combine, represent, exchange and/or disseminate information with a view to reach the objectives the system is designed for”.

For practical purposes, this broad definition has been restricted as follow: “a set of technological, human, organisational, financial, and information resources organized in such a way to improve archiving, retrieval, representation, exchange and dissemination of information produced by institutions involved in shoreline management and on a specific area”.

##### b. Components of the Local Information Systems

In line with the above mentioned definition, the Local Information Systems to be developed in the framework of EUROSION consist of the following components:

##### i. The stakeholders

- The leading institution, which endorses the overall responsibility for implementing, promoting, administrating and maintaining the Information System. It can be either a regional, county, or municipality council, or the local representation of a national administration. In any case, the leading institution has an executive mandate and is accountable for its actions towards the public. Note that even in case the leading institution delegates the implementation and maintenance of the LIS to a third-party institution (e.g. an NGO or a private company), it still remains the responsible party.
- Data providers and users, i.e. institutions willing to share part of their information capital with other institutions, and as a counterpart, being granted an access to information from these other institutions.
- Internet-based service providers, i.e. companies which will customize the Internet-based tools – including run-time, scripts, XML models, etc - provided by EUROSION to the site-specific conditions

##### ii. The equipment

- Hardware and software, i.e. the set of interconnected computers and other devices (e.g. CD players, etc.) - together with their operating applications - which provide the technological infrastructure for archiving, retrieving, representing, exchanging and disseminating information. In the framework of EUROSION, it is assumed that such equipment are PC-based and standard, and that no excessive upgrade is required to use LIS

- An Internet based application, which customizes archiving, retrieval, representation, exchange and dissemination functionalities for the local stakeholders. These functionalities are based on a thorough assessment of user needs and existing information at the local level and are adapted from EUROSION LIS prototype.

### iii. The documentation

- The technical specifications of the Internet-based application. These technical specifications are made of: (i) prototype specifications which describe the features which are common to the different LIS to be developed in the framework of EUROSION; and (ii) specific specifications which are customized for each different local area and are based on both the generic specifications and investigations carried out in each different site.
- The user handbook
- The manual of procedures for setting up and maintaining the LIS. This manual describes all the procedures relating to the LIS and ranging from the request of a data provider to join the LIS to the elaboration of annual reports and statistics.

### **Important:**

The guideline encompasses information about each task: objective, methodology, human resource, financial resource, expected output, and validation.

-The **objective** part explain shortly the main(s) objective(s) of the action/tasks.

-The **methodology** details the process which will lead to the realization of the objective. In this part, it is sometime mentioned that **the methodology can be adapted to the local specificities and/or to the leading organization's usual process.**

-The **human resources** part gives a general idea of the number of staff/day necessities to execute each task. **The effective number of staff/ days of the different tasks may vary a lot from one case to another. Each leading organization will have to take into account the specificities of its site, to adapt those figures and get them closer to the reality.**

-The **financial resources** part gives an overview of the different costs that have to be taken into account for each task. **The leading organization should use these indications to estimate the costs (taking into account its local specific context).**

- The **expected output** part describes each task's main(s) output(s).

-The **validation part** describes the validation process **(which can also be adapted if it is relevant)**

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**STEP 1: FEASIBILITY AND PRE-  
DESIGN STUDY**

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<b>ACTION CODE:</b>	<b>I.1.1.</b>	<b>DESIGNATION/RECRUITMENT OF A LIS PROJECT MANAGER</b>
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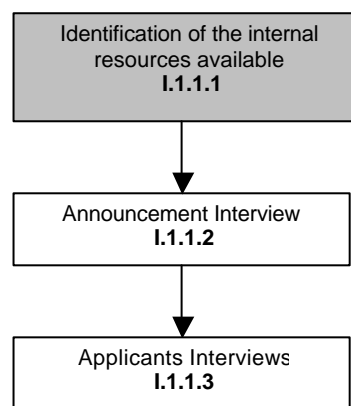
<b>STEP CODE:</b>	<b>I.1.</b>	<b>FEASIBILITY AND PRE-DESIGN STUDY</b>
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## OBJECTIVE

The objective of the action I.1.1, **Designation/recruitment of a LIS manager** is to hire a person, preferably belonging to the leading organization. His experience and skills will allow him to manage efficiently all the steps toward the implementation of the LIS.

## TASK DIAGRAM

**I.1.4.**



<b>TASK CODE:</b>	<b>I.1.1.1.</b>	<b><i>Identification of the internal resources available</i></b>
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<b>ACTION CODE:</b>	<b>I.1.1.</b>	<b>DESIGNATION/RECRUITMENT OF A LIS PROJECT MANAGER</b>
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## OBJECTIVE

The objective of the task I.1.1.1. **Identification of the internal resources** aims at determining the various people, who match the LIS manager desirable profile.

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## METHODOLOGY

The LIS manager will be the leader of the different steps necessary to go toward a successful use of the future LIS: the feasibility and pre-design study, the implementation and the management and maintenance

Task I.1.1.1 responsible should identify the persons, in the organization, whose profile matches closely the one of the "ideal" LIS manager, which is the following:

- Minimum 10 years-experience in civil engineering or management of public administration
- Very good knowledge of coastal issues. A working experience in the coastal management is needed.
- Several successful work experiences in projects management: he must be able to lead a team, to chair a meeting...
- He must be flexible, adaptable, perseverant, convincing, and motivated. He will be the motor of the change.
- He must have good oral and written communication skills.
- He is preferably coming from the leading institution herself
- He must be a daily user of information systems, through his work.
- He must have a good knowledge of the coastal information and management issues.

The level of competences required for the LIS manager can be adapted to the specificities of each case (depending of the level of complexity of the future LIS...).

Each potential LIS manager can be reported in [the competence matrix](#) (annex I.1.1). For the moment, only the **general information (Matrix part I)** are reported, the **competences information (Matrix part II)** will be reported during and after the interviews. The use of the matrix is optional. It is a help for decision tool.

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## HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of 2 staff/days  
The responsible for task I.1.1.1 should be a human resource department officer of the leading organization.

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## FINANCIAL RESOURCES

Human resource cost of 2 staff/days

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## EXPECTED OUTPUT:

The main output from task I.1.1.1. is the **competences matrix**, which allow to see how much people in the leading organization are potentials LIS managers.

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## VALIDATION PROCESS

Task I.1.1.1. is expected to be validated by the Human resource department director of the leading institution. (or by anyone else competent for this task)

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<b>TASK CODE:</b>	<b>I.1.1.2.</b>	<b>Announcements</b>
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<b>ACTION CODE:</b>	<b>I.1.1.</b>	DESIGNATION/RECRUITMENT OF A LIS PROJECT MANAGER
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### OBJECTIVE

The objective of task I.1.1.2 aims at communicating the job opportunity to potentially interested people. The nature of the process will depend on the internal resource capacity, which is detailed in task I.1.1.1 output: **competences matrix**.

### METHODOLOGY

Two scenarios have to be distinguished:

1. The leading organization includes people who have the skills of a potential LIS manager. In this case, a job announcement will be communicated to the people previously identified inside the organization (it will include the description of the profile requirement, see task I.1.1.1.), directly inviting them to an interview. A deadline for the answer has to be fixed. We advise the host organisation to identify a short list of a maximum of 5 applicants, who will be interviewed. The information about date and hour of each interview planned are reported in the matrix. The leading organization can also use its traditional methods of job announcement internal communication.
2. The human resources of the leading information don't match the required profile. In this case, a job announcement will be communicated outside the organization. The traditional means of external communication of job announcement of the host institute will be used (Press, official papers, Internet, Employment agencies...). The offer will include the description of the profile requirement and will ask the applicants to send a curriculum vitae and a covering letter. A deadline for application has to be fixed. The applications are gathered by the human resource officer in charge of the task (or anyone else competent). He will decide which applicants are going to be interviewed. He can report their name and general information about them in the **competences matrix**. We advise the host organisation to identify a short list of a maximum of 5 applicants, who will be interviewed. The information about date and hour of each interview planned can also be reported in the matrix.

### HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of :

- 1 staff/days, for scenario 1.
- 0.5 staff/week, for scenario 2

The responsible for task I.1.1.2 should be a human resource department officer of the leading organization.

### FINANCIAL RESOURCES

-Human resource cost of 1 staff/day for scenario 1 and 0.5 staff/week for scenario 2  
-Announcements costs

### EXPECTED OUTPUT

The expected output of task I.1.1.2 is the list appointments dates with internal applicants (first scenario) and external applicants (second scenario), included in the **competences matrix**.

### VALIDATION PROCESS

Task I.1.1.2. is expected to be validated by the Human resource director of the leading institution. (or by anyone else competent for this task)

<b>TASK CODE:</b>	<b>I.1.1.3.</b>	<b><i>Applicants interviews and final choice of the lis manager</i></b>
<b>ACTION CODE:</b>	<b>I.1.1.</b>	DESIGNATION/RECRUITMENT OF A LIS PROJECT MANAGER

## OBJECTIVE

The objective of task I.1.1.3 is to identify and hire the right LIS manager.

## METHODOLOGY

We advice the host organization to use the following methods, but it also can use other methods if it is more relevant.

1. The interviewers will ask the interviewee to introduce himself and to explain her/his motivations.
2. During or after the interview, the interviewers will be able to fill the competences matrix, which is a tool to help them to identify the person who matches the job profile. It should be taken as a help to decision-making. For each one of the competences criteria, they can assign a mark, from 1 (the worst mark), to 5 (the best mark).
3. At the end of all interviews, the LIS manager will be chosen.

## HUMAN RESOURCES

Human resources necessary to interview depends on the number of interviewees and the number of interviewers. For a number of two interviewers and five interviewees, human resource necessary to carry out the task is estimated to the equivalent of 2 staff/days.

The responsible for task I.1.1.2 should be a human resource department officer of the leading organization.

## FINANCIAL RESOURCES

-For a number of two interviewers and five interviewees, human resource cost of 2 staff/days.

## EXPECTED OUTPUT

The expected output of task I.1.1.3 is choice and appointment of the LIS manager, formalised by the contract of the LIS manager.

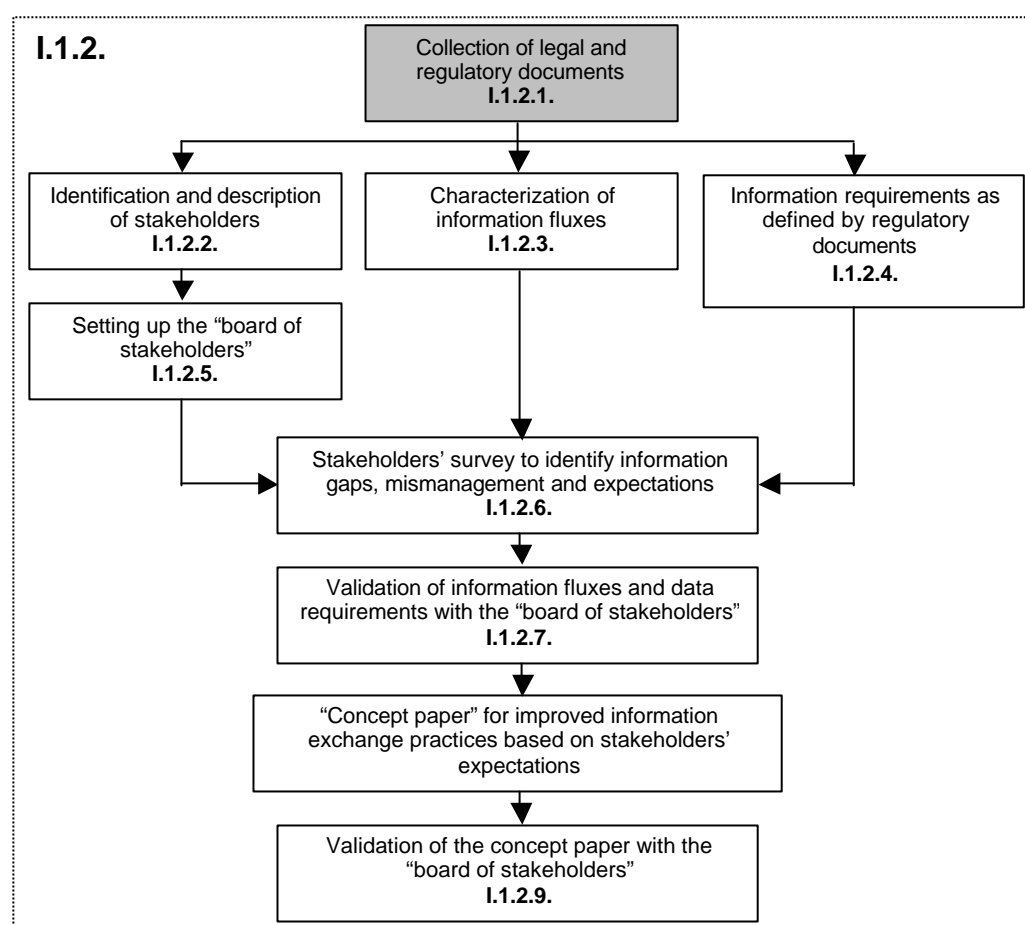
## VALIDATION PROCESS

Task I.1.1.3.output, the contract of the LIS manager, is expected to be signed by the Human resource director (or by anyone else competent for this task), the director of the leading institution, and the LIS manager.

## OBJECTIVE

The objective of the action I.1.2. "User need requirement survey" is to highlight the expectations of local stakeholders towards the local information system. These expectations are expressed both in terms of which data have to be disseminated (reports, database, maps, pictures, others), but also in terms of which way the dissemination should be ensured (restricted versus unrestricted, downloadable data versus displaying metadata only, pdf format versus MS Word format, etc.). They are meant to mitigate bottlenecks and fill the gaps observed in current information fluxes between stakeholders.

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.1.2.1.</b>	<b><i>Collection of legal and regulatory documents</i></b>
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<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>
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## OBJECTIVE

The objective of the task I.1.2.1. "Collect and analysis of legal and regulatory documents" aims at inventorying and retrieving laws, decrees, and regulations at national and sub-national levels which establish the various stakeholders potentially involved in coastal erosion management, specifies their responsibilities and govern the relations between one another.

## METHODOLOGY

Various sources of legal and regulatory documents exist in each European country. If official journals are the most exhaustive ones, not all of them have been digitised and made accessible on the Internet. Their consultation may therefore requires some investigations within the archives of national parliaments. By way of illustration, the site **Legifrance** ([www.legifrance.fr](http://www.legifrance.fr)) constitutes on example of a digital official journal in Europe.

Depending on countries, regulatory texts relevant for coastal erosion management can be quite different. As an example, the following acts constitutes the backbone of French regulations which impact decision-making processes in relation with coastal erosion management and coastal defence:

- Decentralisation Acts ("Lois Deferre", 1982)
- Environment Act ("Loi Barnier", 1995)
- Coastal Act ("Loi Littoral", 1986)
- Urbanism Act ("Loi Solidarité et Renouvellement Urbain", 2000)

From a general point of view and regardless of the country, investigators will consider the following areas assumed to cover all possible areas impacting decision-making processes in relation with coastal erosion management:

- Organisation of the state (distribution of responsibilities between stakeholders)
- Coastal Management
- Environmental risk prevention and mitigation
- Civil protection (e.g. in case of extreme meteorological events)
- Water quality (coastal waters)
- Environment impact assessment prior to investment projects (e.g. dams, harbours)
- Nature conservation (e.g. coastal natural reserves)
- Spatial Planning (e.g. framework and management plans)

Note that in some areas, national regulations may be locally complemented with site-specific regulations (e.g. *décrets préfectoraux* or *décrets municipaux* in France)

It is also worth mentioning that some legal and regulatory texts with a European and national scope may have already been referenced by EUROSION project, and accessible from EUROSION web site.

## HUMAN RESOURCES

Human resources necessary to carry out the collection of legal and regulatory documents dedicated to a specific local site are estimated to the equivalent of 1.5 staff/week (0.3 man/month) (This figure can be adapted to the specificities of each local site). The investigator profile should have the following minimum requirements:

- minimum 2 year-experience in civil engineering or management of public administration
- Basic knowledge of coastal dynamics
- Preferably coming from the local site itself

(The level of competences required for this task can be adapted to the specificities of each local site: size, distribution of responsibilities... )

This person can be called the "LIS assistant". (But it can also be done by the LIS manager)

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## FINANCIAL RESOURCES

- Human resource cost of 1.5 staff/week
- Cost of the visit of national parliament archives in case information is neither available through the internet, nor available *in situ*.
- Cost of the digitisation of documents in case they are not available in digital format.

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## EXPECTED OUTPUT:

### Document I.1.2.1, Legal framework document

The main output from task I.1.2.1. is a collection of texts, possibly in digital format to enable easy exploitation afterwards, and a brief description of each of them using the following template (e.g. in France):

Title	Official reference	Summary
Coastal Act ("Loi Littoral")	Law n° 86-2 of 3 January 1986 relating to the protection of coastal zones	The Coastal Act defines a 100 meter setback line within which any development is severely controlled. This municipality is in charge of implementing the coastal act but may decide to extend the setback line beyond the 100 meter limit if needed. The Act also specifies the exceptional conditions which can justify that this 100 meter line is reduced (e.g. aquaculture).
Environment Act ("Loi Barnier")	Law 95-101 of 2 February 1995, 1995 relating to the constitution of predictable risk prevention	The Environmental Act states that in each <i>department</i> (county) a plan for predictable risk prevention has to be elaborated by the county delegation of the national administration. The risk prevention plan reviews the different risks likely to be encountered at the county level and for each of them delineates the areas at risk, where any development is severely controlled. The risk prevention plan becomes part and parcel of all municipal management plans depending on this county and has therefore to be enforced by mayors.
Building Act ("Loi SRU")	Law 2000-1208 of 13 December 2000 relating to local spatial planning and building regulations.	The Building Act establishes the condition for transferring from the national government to municipal authorities the responsibility to issue building permits. The Act defines two levels of documents: (i) a 5-year regional coherence plan, (ii) a 2-year municipal management plan.
To be completed		

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## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result of his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

<b>TASK CODE:</b>	<b>I.1.2.2.</b>	<b><i>Identification and description of local stakeholders</i></b>
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<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>
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## OBJECTIVE

The objective of task I.1.2.2 "Identification and description of stakeholders" aims at inventorying the various organizations and people, at different levels, which are potentially willing to participate in the local information system. This identification will be based on the expected output of task I.1.2.1 which specifies which stakeholders are statutory involved in coastline management, together with their responsibilities. However, this list will be completed with other stakeholders which can be considered as well as key players in the local coastline management, either as advisory/consultative bodies, or specific interest groups ("lobbies")

## METHODOLOGY

1. The legal and regulatory documents will be assessed in such a way to answer the following questions:
  - a. Which organizations are involved in the coastline management?
  - b. What is their level of responsibility (international, national, regional, local)? Depending on the type of administrative system, another level definition, (e.g.: international, national, regional, sub regional, local) can be chosen.
  - c. What kind of responsibility do they have (Policy, Operational, Research/Scientific, other to be specified)?

Please, the answers can be directly reported in a synthetic table: **table 1221: Main organizations involved** (see: "expected output").

In **annex of this table** (see: "expected output"), for more precisions about each organisation, the following information can be given, more precise and detailed:

- a. Formal mandates
  - b. Commitment
  - c. Capacities
  - d. Finances
2. There should also be other organizations, which are not described in the official texts (NGO, other data users and providers...). To help the identification of those institutions, we recommend to use the following "check-list" :
  - institutions involved in the understanding of environmental processes (physical, biological, chemical)
  - institutions involved in policy making and implementation
  - institutions designing and implementing of technical and engineering solutions
  - institutions implementing social and economical activities impacting the coast
  - institutions influencing the social perception of the coasts
  - institutions producing, processing, and disseminating information

Local coastal authorities can be asked, internet can be consulted, or, when it exists, a local central base can be consulted (e.g. the Isle of White Coastal Observatory, in England). These organizations will also be listed and the same questions (a, b, c) will be asked to them. The answers will also be reported in the **table 1221: Main organizations involved** and its annex.

3. Contact the organizations (phone, mail...) and determine which specific(s) person(s) would be involved in the LIS. Two persons should be identified:
  - a. A responsible, legally authorized to represent the organization, and who would be interested in representing the organization at the future board of stakeholders, which will be set up on task I.1.2.5.
  - b. And another representative of the organization, which will also be the main interlocutor for all the other surveys necessary to set up the LIS.

## HUMAN RESOURCES

Human resources necessary to carry out this task is estimated to the equivalent of 1 staff/week (0.25 man/month).

The investigator should be the person who realized task 1.2.1. (the LIS assistant), or anyone else competent. He/she will work under the lead of the LIS manager.



## FINANCIAL RESOURCES

Human resource cost of 1 staff/week

## EXPECTED OUTPUT

Table 1222 Main organizations involved

Name of the organization	Type of responsibility (Policy, Operational, Research/Scientific, other)	Short description of responsibility	Representative persons (General manager, and contact person)	Contact information (address, tel, fax, email)
<b>INTERNATIONAL LEVEL</b>				
•				
•				
•				
<b>NATIONAL LEVEL</b>				
•				
•				
•				
<b>REGIONAL LEVEL</b>				
•				
•				
•				
<b>LOCAL LEVEL</b>				
•				
•				
•				

Annex of the table: More precisions about each organization:

### Example of the Dutch Ministry of Transport, Public works and Water Management (V&W), Directorate-General of Public Works and Water Management ('Rijkswaterstaat')

#### Formal mandate

The tasks and authorities of the national government in accordance with the care of dam or dike are written in the Law on Watersheds (Wet op de Waterkering), Law on Delta-region (Deltawet), Water State law (Waterstaatswet) and Law on National Water Works (Wet beheer Rijkswaterstaatswerken). The Ministry of Transport, Public works and Water Management (V&W) is responsible.

- Safeguard the position of the coastline and combat structural erosion
- Formulate framework, and subsequent giving of mandates, for activities within a governmental managed dam or dike
- Observance and enforcement of limitations within a governmental managed dam or dike, if necessary by obligation
- Supervision on management of dam and dike

Supervising own execution board: Directorate-General of Public Works and Water Management ('Rijkswaterstaat')

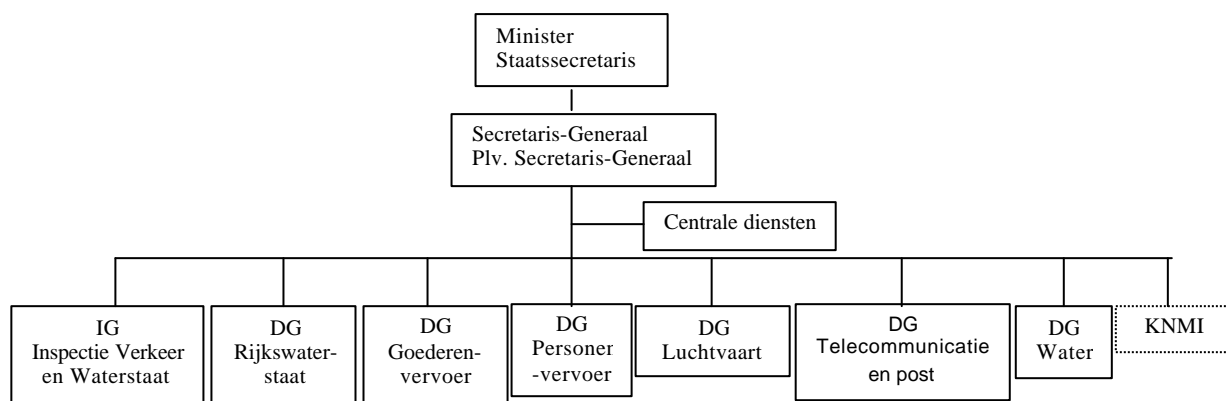
#### Commitment

The active roll of the Ministry in developing new policy, at the moment the preparation and implementation of the Line of Policy for the Dutch Coast ('Beleidslijn voor de kust')

- The implementation and execution of existing policy, involving other stakeholders
- Annual account of there own policy

Leading roll in the implementation of Integrated Coastal Zone Management (ICZM)

#### Capacity



Approximately 30 employees are working on coastal policy

### Financial

From the €125.7 billion of the total budget of the national government €8 billion is going to the Ministry of Transport, Public Works and Water Management.

From the budget of 'Rijkswaterstaat' approximately a quarter is spend on flood defences and water management.

---

### VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result of his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

<b>TASK CODE:</b>	<b>I.1.2.3.</b>	<b><i>Characterization of information fluxes</i></b>
<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>

## OBJECTIVE

The objective of task I.1.2.3 “Characterization of information fluxes” is to draw a clear picture of the information fluxes about coastline management, which characterize the current system.

## METHODOLOGY

Different scenarios are possible:

### Scenario 1:

1. MS Word will be used. Report all the organizations that have been inventoried during task I.1.2.2 on a diagram. Each organization is represented by a box (see “expected output”).
2. The diagram has to be divided into several levels: international, national, regional, local. (Depending on the type of administrative system, you may choose another level definition if it's clearer, such as: international, national, regional, sub regional, local).
3. Information fluxes have to be represented by arrows. Each arrow represents one information flux. It comes from the organization which provides the information and goes toward the organization which receives it. Two kind of fluxes are going to be distinguished :
  - a. Fluxes according to legal framework (normal arrows)
  - b. Others fluxes (which are not legally defined but are nonetheless observed) (dotted line arrows). A phone investigation may help the investigator to identify those arrows. He can phone to the persons previously identified and ask them information about real fluxes.

*Note: In some countries, the fluxes may differ, depending on the project. In such a case, two major options can be considered: (i) The diagram represents only the most usual and common fluxes, (ii) Several diagrams are realized, representing the different scenarios.*

### Scenario 2:

The different kind of fluxes (see scenario 1) are described in a textual document. This document explains the different phases of decision making, and the fluxes which characterize those phases.

*Note: Scenario 1 and 2 can be both applied, the diagram illustrating the textual document*

## HUMAN RESOURCES

Human resources necessary to realize the information fluxes diagram can be estimated to the equivalent of 2 staff/days (But it can vary, depending on the size of the country and the complexity of its organization...).

The investigator should be: (i) the person who realized task 1.2.1 and 1.2.2. (The LIS assistant) or anyone else competent in the leading organization, or (ii) a consultant specialized in information systems. The investigator will work under the lead of the LIS manager.

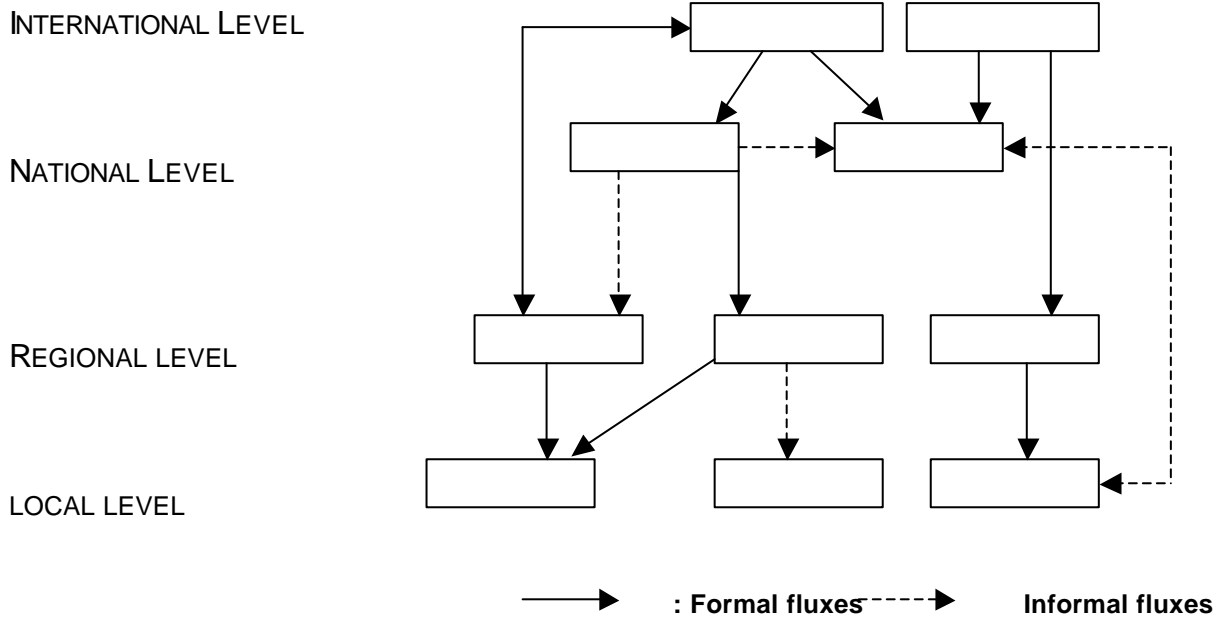
## FINANCIAL RESOURCES

Human resource cost of 2 staff/days

---

## EXPECTED OUTPUT

### Scenario 1: DIAGRAM I.1.2.3: INFORMATION FLUXES DIAGRAM



An example of information fluxes diagram is provided in [annex 1.3](#)

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## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

-Firstly, task I.1.2.3 is expected to be validated by the LIS project manager at the site level:

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result of his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

-Secondly, task I.1.2.3 is expected to be validated by the board of stakeholders (task I.1.2.6.)

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<b>TASK CODE:</b>	<b>I.1.2.4.</b>	<b><i>Information requirements as defined by regulatory documents</i></b>
<b>ACTION CODE:</b>	<b>I.1.2.</b>	USER NEED AND FUNCTIONAL REQUIREMENT SURVEY

## OBJECTIVE

The objective of task I.1.2.4 “Information requirements as defined by regulatory documents” aims at inventorying the various data which are required, according to the legal framework

Thanks to the output of task I.1.2.1, the **Legal framework document**, the data needed will be clearly outlined.

## METHODOLOGY

1. Based on the review of legal and regulatory documents (Task 1.2.1), the list of documents, data, and other information sources required by law, will be established. This list will adopt the following standardized typology: (i) textual documents (e.g. decree, management plan, scientific study), (ii) geo-referenced information (e.g. maps, GIS datasets), (iii) figures, photographs and videos, (iv) tables and statistics, (see outputs)
2. For each of the information sources identified, the following characteristics will be mentioned (if sufficiently detailed by the legal and regulatory documents): (i) the geographical scope (e.g. municipal, regional, national, international), (ii) the type of content (physical, ecological, policy, technical, socio-economical, public perception, information), (iii) the support and format required, (iv) the frequency of update, (v) any other significant specification (e.g. scale)
3. Results will be reported as an extension of the table provided in task 1.2.1.

## HUMAN RESOURCES

Human resources necessary to determine the information requirement as defined by regulatory documents is estimated to the equivalent of 1 staff/day.

The investigator should be the person (i) the LIS assistant or anyone else competent in the leading organization, or (ii) a consultant specialized in information systems. The investigator will work under the lead of the LIS manager.

## FINANCIAL RESOURCES

Human resource cost of 1 staff/day

## EXPECTED OUTPUT

TABLE I124: INFORMATION REQUIREMENTS AS DEFINED BY REGULATORY DOCUMENTS TABLE

Title	Official reference	Summary	Information requirements	Responsible Institutions	Geographical scope	Type of content	Frequency of update	Other specification
Coastal Act ("Loi Littoral")	Law n° 86-2 of 3 january 1986 relating to the protection of coastal zones	The Coastal Act defines a 100 meter setback line within which any development is severely controlled. This municipality is in charge of implementing the coastal act but may decide to extend the setback line beyond the 100 meter limit if needed. The Act also specifies the exceptional conditions which can justify that this 100 meter line is reduced (e.g. aquaculture).	Delineation of the setback line	Municipality	Municipal	Physical	When necessary	
			Scientific reports	Municipality	Municipal	Physical, ecological	When necessary	
			Setback line decree	Municipality	Municipal	Policy	When necessary	
Environment Act ("Loi Barnier")	Law 95-101 of 2 february 1995 relating to the constitution of predictable risk prevention	The Environmental Act states that in each <i>department</i> (county) a plan for predictable risk prevention has to be elaborated by the county delegation of the national administration. The risk prevention plan reviews the different risks likely to be encountered at the county level and for each of them delineates the areas at risk, where any development is severely controlled. The risk prevention plan becomes part and parcel of all municipal management plans depending on this county and has therefore to be enforced by mayors.	Risk prevention plan	DDE	Departmental	Physical	5 years	
			Risk maps	DDE	Departmental	Physical	5 years	1:50,000 scale
Building Act ("Loi SRU")	Law 2000-1208 of 13 decembre 2000 relating to local spatial planning and building regulations.	The Building Act establishes the condition for transferring from the national government to municipal authorities the responsibility to issue building permits. The Act defines two levels of documents: (i) a 5-year regional coherence plan, (ii) a 2-year municipal management plan.	Territorial coherence framework	Groups of municipalities	Regional	Policy	5 years	
			Local urbanism plans	Municipality	Municipal	Policy, technical	3 years	
			Land use map	Municipality	Municipal	Socio-economical	3 years	1:25,000 scale
To be completed								

## VALIDATION PROCESS

-Firstly, task I.1.2.4 is expected to be validated by the LIS project manager at the site level. The following validation process should be used: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result of his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

-Secondly, task I.1.2.4 is expected to be validated by the board of stakeholders (task I.1.2.7.)

<b>TASK CODE:</b>	<b>I.1.2.5.</b>	<b><i>Setting-up the Board of stakeholders</i></b>
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<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>
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## OBJECTIVE

The objective of task I.1.2.5 "Setting up the board of stakeholders" is to create a group of people, representative of the different stakeholders which are concerned by the LIS. This board of stakeholders will be able to: (1) Validate the information fluxes and existing data, which have been identified in steps I.1.2.3 and I.1.2.4, and, (2) Validate the concept paper for improved information exchange practices based on users' expectations.

---

## METHODOLOGY

The leading organization should use the following process, to set up the board: (But another process can be used if it is relevant).

Some responsible of the different organisations involved have already been identified (task I.1.2.2). They are all potential members of the board of stakeholders. The board of stakeholders should be composed of a maximum of ten persons.

1. If the number of responsible previously identified doesn't exceed 10 people:

A registered letter, written by the LIS manager, will be sent to each of them, explaining them their responsibilities and asking them to sign, and to send back the letter, confirming their willingness to be part of the board of stakeholders. A deadline has to be fixed (e.g. 2 weeks after the sending of the letter). A phone call to the person allows ensuring that he/she has taken into account the deadline. The composition of the board will be written in the following board (see Expected output).

2. If the number of responsible previously identified does exceed 10 people:

The LIS manager will have to identify a group of person, the most representative possible of the different kind of stakeholders present in his area (e.g.: representatives of. Central Government, to Local Government, Government Agencies, NGOs and the public charities, consulting and universities). Then, a register letter will be sent to them... (See first possibility).

---

## HUMAN RESOURCES

Human resources necessary to set up the board of stakeholders is estimated to the equivalent of:

- 1 staff/day, for the first scenario
- 2 staffs/days, for the second scenario

The main actor of this task will be the LIS manager, or anyone else competent.

---

## FINANCIAL RESOURCES

-Communication costs (Sending of registered letter, phone...)

-Human resource cost of 1 staff/day, for the first scenario and 2 staffs/days, for the second scenario

---

## EXPECTED OUTPUT

table 1.2.5: Board of stakeholders

Name	Organization	Profession	Phone	Fax	Address	Email
•						
•						
•						

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## VALIDATION PROCESS

Task I.1.2.5 output, the board of stakeholders' document, will be signed by the LIS manager.

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<b>TASK CODE:</b>	<b>I.1.2.6.</b>	<b><i>Stakeholders' survey to Identify information gaps, mismanagement and expectations</i></b>
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<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>
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## OBJECTIVE

The objective of task I.1.2.6 "Stakeholders' survey to identify information gaps, mismanagement, and expectations" aims at identifying potential problems, related to issue such as: availability of information, access of people to information, quality of information, respect of legal area of responsibilities. It also aims at providing fuel for the design of functional specifications from a thorough understanding of stakeholders' expectations towards a Local Information System.

The outlining of the stakeholders, their responsibilities, and the information they produce/share/gather can bring to light some mismanagement or bottlenecks. So, the survey, which focuses on the current information process, can contribute to find solutions. The implementation of the system will entail a process reengineering.

## METHODOLOGY

The following questionnaire (see [annex I.1.2.6](#)) (This is a tentative list of key questions to be addressed by the survey. If the LIS manager thinks that other questions could be relevant, he can add them to the questionnaire.) is going to be provided to the board of stakeholders. To reach this goal, several options exist:

- The survey can be sent by email to the different persons concerned by the LIS. A deadline has to be fixed (e.g.: one week after the sending of the survey). A phone call to the person allows ensuring that he/she has taken into account the deadline.
- An appointment can be made, where the investigator visit the stakeholder and guide him while he answers the questions, or where the investigator start a conversation with him, where all subjects of the survey are discussed.
- All the survey can be lead by phone

The survey form is already available on the EUROSION web site in several languages. Should the appropriate language not be available yet, a translation shall be required.

## HUMAN RESOURCES

Human resources necessary to carry out the survey is estimated to the equivalent of 2 staff/week.

The investigator should be (i) the LIS assistant, or anyone else competent in the leading organization or (ii) a the consultant specialized in information systems. He will work under the lead of the LIS manager.

## FINANCIAL RESOURCES

-Human resource cost of 2 staff/week

-If needed, costs of translation of the survey form

## EXPECTED OUTPUT

The result of the survey can be reported in a chart. But we also recommend to summarize it in a descriptive and interpretative text. These documents will be then reported during the first meeting of the board of stakeholders

## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

<b>TASK CODE:</b>	<b>I.1.2.7.</b>	<b><i>Validation of information fluxes, information requirement and results from the stakeholders' survey with the Board</i></b>
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<b>ACTION CODE:</b>	<b>I.1.2.</b>	<b>USER NEED AND FUNCTIONAL REQUIREMENT SURVEY</b>
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## OBJECTIVE

The objective of task I.1.2.6 "Validation of information fluxes and existing data with the Board" aims at checking that all kind of stakeholders agree on the fact that the fluxes of information and data requirements, which have been inventoried in the precedent steps match reality. To reach this goal, a meeting of the board of stakeholders will be organized, in order to validate the output of task I.1.2.3 et I.1.2.4.

## METHODOLOGY

- One month before the meeting, a registered letter is sent, together with fluxes diagram (1.2.3.), the information requirement table (1.2.4.), and the stakeholders' survey (1.2.6) to the members of the board, in order to invite them, and asking them to answer to the invitation before a deadline (e.g. 2 weeks). The agenda shall contain the following 5 points:
  - presentation of the coastal LIS objectives and methodology
  - presentation of the fluxes diagram and information requirement table
  - presentation of the stakeholders' survey results
  - discussions and gap filling
  - validation of documents
- During this meeting, the output of tasks I.1.2.3. (**Information fluxes diagram**), I.1.2.4. (**Information requirements as defined by regulatory documents Table**), and I.1.2.6. (**Stakeholders' survey**) will be presented by the LIS manager.
- After his intervention, the board will validate or invalidate the document.
  - If the board agrees on the fact that the model matches reality, it's validated.
  - If the board invalidate the document, some changes will be brought to the output of tasks I.1.2.3. and I.1.2.4. (By the responsible of the realization of those documents), in order to match their vision. Once the changes have been taken into account, the board of stakeholders will have to validate the document again: the process is back to 1. : Another meeting of the board has to be organized...
- (Option) At this point, to give the stakeholders an overall view on what a basic LIS can be (especially in term of functionalities), a demonstration of an existing LIS prototype can be done. They shouldn't have any misconceptions about it.

## HUMAN RESOURCES

The board of stakeholders, the LIS manager, the LIS assistant (the presence of a person with IT skills is advised, in order to keep the debate technically realistic)

## FINANCIAL RESOURCES

-Human resource cost of 1 staff/day  
 -Communication costs (which are expected to be low: sending of registered letters, phone call...)  
 -Organization of the meeting (coffee break...)  
 The costs can be multiplied by the number of meeting necessities to validate the documents.

## EXPECTED OUTPUT

- The finals versions of board I.1.2.3., I.1.2.4., and I.1.2.6, with the agreements of the board of stakeholders.
- The minutes of the board meeting are written by the person who already worked on tasks I.1.2.3. and I.1.2.4.

---

## VALIDATION PROCESS

The minutes of the meeting are validated by the LIS manager:

**TASK CODE:** I.1.2.8.

***Concept paper for improved information exchange practices based on users' expectations***

**ACTION CODE:** I.1.2.

USER NEED REQUIREMENT SURVEY

---

**OBJECTIVE**

The objective of task I.1.2.8 "Concept paper for improved information exchange practices based on users' expectations" is to take into account the lessons learned in terms of mismanagement and information bottlenecks. This paper will be built on the base of task "I.1.2.6" output, i.e. the result of the survey.

---

**METHODOLOGY**

Based on the information fluxes diagram, information requirements, and the stakeholders' survey, the concept will feature 4 different sections :

- **Section 1 – Lessons learnt from the stakeholders' survey and the legal framework**
- **Section 2 – Proposed principles to improve the content of information fluxes**
- **Section 3 – Proposed LIS functionalities for an improved information management at the local**
- **Section 4 – Proposed architecture for a LIS**

(This section divides the LIS into distinct parts and gives an overview of the organizational and technical scheme of the LIS. It could include the corporate design of the LIS (Number of frames, Size of frames, background colours, text colours, text font, text size, logos, and counters of visitors). A model of pages of the site will be presented here).

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**HUMAN RESOURCES**

Human resources needed to realize the **Concept paper for improved information exchange practices based on users' expectations** is estimated to the equivalent of 1staff/ week.

The main investigator should be the LIS assistant, if he has enough IT skills to realize such a draft (it is very important, for **Section 3** and **4** of the paper) or anyone else competent in the leading organization, or the consultant specialized in information systems. He will work under the lead of the LIS manager.

---

**FINANCIAL RESOURCES**

Human resource cost of 1staff/ week.

---

**EXPECTED OUTPUT**

**PAPER I.2.8: CONCEPT PAPER FOR IMPROVED INFORMATION EXCHANGE PRACTICES BASED ON USERS' EXPECTATIONS**

This paper must be short (no more than 10 pages) and precise. The structure is defined in the method part of this task.

**Give an example, after the test in the pilot sites**

---

## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

-Firstly, task I.1.2.8 is expected to be validated by the LIS project manager at the site level:

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

-Secondly, task I.1.2.8 is expected to be validated by the board of stakeholders (task I.1.2.9.)

<b>TASK CODE:</b>	<b>I.1.2.9.</b>	<b><i>Validation of the concept paper with the Board of stakeholders</i></b>
<b>ACTION CODE:</b>	<b>I.1.2.</b>	USER NEED REQUIREMENT SURVEY

## OBJECTIVE

The objective of task I.1.2.9 “Validation of the concept paper with the stakeholders” aims at checking that the output of step I.2.8, **Concept paper for improved information exchange practices based on users’ expectations** matches really their expectations. To meet this target, a meeting of the board of stakeholders will be organized.

## METHODOLOGY

1. Two weeks before the meeting, a registered letter is sent to the members of the board, in order to invite them, and asking them to answer to the invitation before a deadline (e.g. Three days).
2. During this meeting, the output of tasks I.1.2.8. (**Concept paper for improved information exchange practices based on users’ expectations**) will be presented by the LIS manager.
3. After his intervention, the board will vote in order to validate or invalidate the document.
  - a. If the board agrees on the fact that the model matches reality, it’s validated.
  - b. If the board invalidate the document, some changes will be brought to the output of task I.1.2.8. (By the responsible of the realization of this documents), in order to match their vision. Once the changes have been taken into account, the board of stakeholders will have to validate the document again: the process is back to 1. : Another meeting of the board has to be organized...

## HUMAN RESOURCES

The board of stakeholders, the LIS manager, the LIS assistant (the presence of a person with IT skills is advised, in order to keep the debate technically realistic)

## FINANCIAL RESOURCES

- Human resource cost of 1 staff/day
- Communication costs (which are expected to be low: sending of registered letters, phone call...).
- Organization of the meeting (coffee break...)

The costs can be multiplied by the number of meeting necessities to validate the documents.

## EXPECTED OUTPUT

- The finals versions of the **Concept paper for improved information exchange practices based on users’ expectations**
- The minutes of the board meeting are written by the person who already worked on task I.1.2.8

## VALIDATION PROCESS

The minutes of the meeting are validated by the LIS manager:

<b>ACTION CODE:</b>	<b>I.1.3.</b>	<b>INVENTORY OF EXISTING SOURCE OF INFORMATION AT THE LOCAL LEVEL</b>
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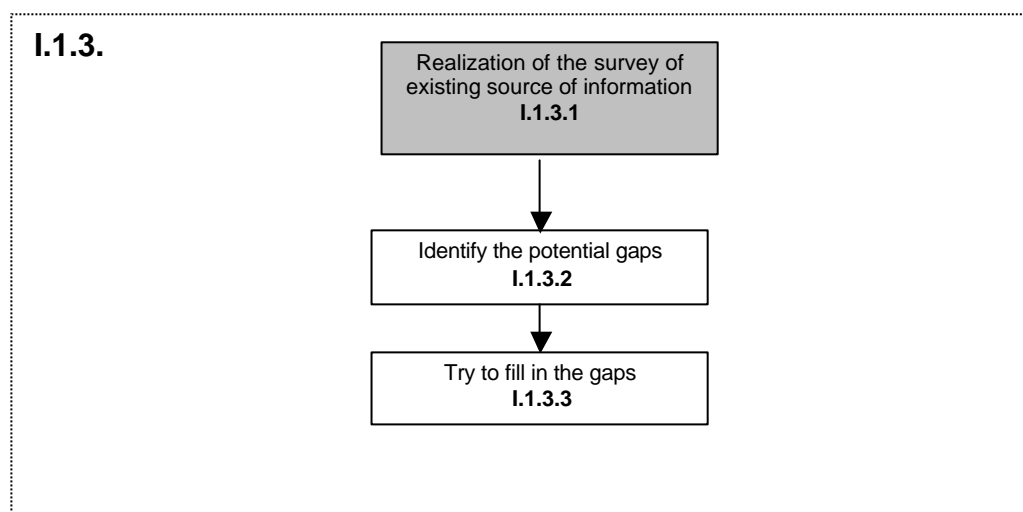
<b>STEP CODE:</b>	<b>I.1.</b>	<b>FEASIBILITY AND PRE-DESIGN STUDY</b>
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## OBJECTIVE

The objective of the action I.1.3, **Inventory of existing source of information at the local level** is to inventor all the information held by all the institutions which provide data about coastal erosion. The nature of each information provided is also going to be inventoried: each information will be defined by several attributes A broad vision of the organizations involved in coastal erosion and the information they provide has already been given during action I.1.2. Action I.1.3 will allow to have a precise and exhaustive vision of the following points:

- Which information and data are available?
- Where are they available and how?
- In which format?
- In which language? ...

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.1.3.1.</b>	<b>Realization of the “survey of existing source of information”</b>
<b>ACTION CODE:</b>	<b>I.1.3.</b>	INVENTORY OF EXISTING SOURCE OF INFORMATION AT THE LOCAL LEVEL

## OBJECTIVE

The objective of task I.1.31. **Realization of the “existing information survey”** aims at gathering information about existing information. To meet this goal, each organization identified during task 1.2 will be contacted, and asked, to provide information about the main information she has got, and would be able to share.

## METHODOLOGY

1. A contact person, at the level of each stakeholder (it can be a person which has already answered to a former survey, or the representative of the organization in the board of stakeholder, or anyone else competent) is identified. There can be two contacts persons, in a specific organization. Contact persons must be able to describe the available products and their metadata, according to the EUROSION standard (ISO core elements set). He will be asked to fill in the metadata tables (or to provide documents about it, it depends on his involvement capabilities), to describe the accessibility of the metadata/data, from an administrative and technical point of view.
2. The survey available in [annex I.1.3: “Existing information survey \(1\)”](#) should be lead. To reach this goal, several options exist:
  - a. The survey (and **the list of keywords, annex I.1.3bis**) can be sent by email to the contact persons previously identified. A deadline has to be fixed (e.g. one week after the sending of the survey). A phone call to the person allows ensuring that he/she has taken into account the deadline.
  - b. An appointment can be made, where the investigator visit the stakeholder and guide him while he answers the questions.

*(1) Note: This survey asks information about a set of metadata (i.e. information about data themselves) corresponding to the Eurosion metadata model (which complies with the norm ISO 19115). This includes mandatory and optional metadata.*

*To facilitate the inventory, we divided the questionnaire in different information types (Textual documents, Non-georeferenced images pictures and video, tables and statistics, Web links, Events, Organisations and contacts, Geo-referenced information).*

*The LIS manager can choose, if necessary, to use a different set of information types than the proposed one. For each one of the information type he has chosen, the minimum mandatory metadata will be conserved, and some optional metadata can be chosen or not.*

*The information types and set of metadata adopted here will also be used when the metadata will be entered into the system (when the LIS will be operational).*

*Whatever information type he decides to take into account, the initial Eurosion metadata model won't be changed. The minimum metadata requirement is still respected, and the division in different data types doesn't change the general processing of metadata.*

## HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of 1.5 staff/week (0.3 man/month). The investigator profile should have the following minimum requirements:

- minimum 2 year-experience in civil engineering or management of public administration
- Basic knowledge of coastal dynamics
- Preferably coming from the local site itself

The investigator should be the person who realized the different investigations of action I.1.2, or anyone else competent. He will work under the lead of the LIS manager.

## FINANCIAL RESOURCES

-Human resource cost of 1.5 staff/week

-The cost of the visit of the organizations, if this option is chosen for the survey.

-The communication costs (which would be higher if the phone survey option is chosen)



---

### EXPECTED OUTPUT:

The main output from task I.1.3.1. is the knowledge of all existing source of information, the information they produce, and the information about this information. All the excel documents gathered (the answer of each stakeholder) should be stocked in a file, possibly called '**existing information database**'. It could also be stocked in a directory per organization or a RDBMS.

---

### VALIDATION PROCESS

Task I.1.3.1. is expected to be validated by the LIS project manager at the site level. The following validation process is recommended: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
  2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
    - a. validate the document (in this case, the task is over)
    - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).
-

**TASK CODE:** I.1.3.2. *Identify the potential gaps*

**ACTION CODE:** I.1.3. INVENTORY OF EXISTING SOURCE OF INFORMATION AT THE LOCAL LEVEL

## OBJECTIVE

The objective of task I.1.3.2 is to ensure that all the information requirements identified during task I.2.4 and validated during task I.1.2.7 are in the “existing information database”

## METHODOLOGY

1. Compare the **Data requirements as defined by regulatory documents table** (validated by the board of stakeholders) to the output of task I.1.3.1: the “existing information database”.
2. Determine the possible information gaps.
3. Report them in the table 1132: **information gaps**.

## HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of 0.5 staff/week. The investigator should be the person who realized the different investigations of actions I.1.2, and I.1.3 (, or anyone else competent). He will work under the lead of the LIS manager.

## FINANCIAL RESOURCES

Human resource cost of 0.5 staff/week.

## EXPECTED OUTPUT

**TABLE 1132: INFORMATION GAPS**

Level of activity	Information	Information needed (by theme)				
		Public Perception and Stakeholder Communication	Socio Economical	Technical	Policy	Physical
International level	XXX, XXX...					
National level						
Regional level						
Local level						

## VALIDATION PROCESS

Task I.1.3.1. is expected to be validated by the LIS project manager at the site level. The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
  - c. validate the document (in this case, the task is over)
  - d. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).



<b>TASK CODE:</b>	<b>I.1.3.3.</b>	<b><i>Try to fill in the gaps</i></b>
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<b>ACTION CODE:</b>	<b>I.1.3.</b>	<b>INVENTORY OF EXISTING SOURCE OF INFORMATION AT THE LOCAL LEVEL</b>
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## OBJECTIVE

The objective of task I.1.3.3 is to see if the missing information, which have been previously identified does exist. Moreover, if the information exists, the organization responsible, the way to access information, and the reason why it hasn't been previously inventoried have to be identified too.

## METHODOLOGY

Contact the main institutions involved in local policy making and implementation, or, when it exists, an institution which centralize all data about coastal management. The contact can be made by phone. If necessary, an appointment can be taken. Those institutions will be asked if they know if such information exists and where it can be found.

1. If the information exists and is identified, a contact will be made with the organisation that has it (it can be an institution who already answered to former surveys, but who has forgotten to quote this information, it can also be an organization who doesn't want to spread this information). The institution will have to give precisions about this information, and report it in the **Existing information survey** format.
2. If the information doesn't exist, it should be taken into account by this institution, which will study the problem.

## HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of 1 staff/week. The investigator should be the person who realized the different investigations of action 1.2, and 1.3 (or anyone else competent). He will work under the lead of the LIS manager.

## FINANCIAL RESOURCES

- Human resource cost of 1 staff/week
- The cost of the visit of the organizations, if this option is chosen for the survey.
- The communication costs (which would be higher if the phone survey option is chosen)

## EXPECTED OUTPUT

The expected output of task I.1.3.3 are:

- If necessary, the completion of the **"existing information database"**.
- An eventual list of **none existing but required information**.

## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In the second case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).



**ACTION CODE:**

**I.1.4.**

**ELABORATION OF TECHNICAL SPECIFICATIONS FOR THE LIS**

**STEP CODE:** I.1.

**FEASIBILITY AND PRE-DESIGN STUDY**

## OBJECTIVE

The objective of action I.1.4, **Elaboration of the technical specifications for the LIS**, is to describe the characteristics the LIS should have in order to meet the requirements, in terms of:

- Equipment (hardware, software),
- Functions,
- Design,
- Support documentation,
- Timeframe and budget necessities to develop the LIS.

The technical specifications are the reference document, which will provide all the necessary information to the IT developer.

**Action I.1.4 is based on the document called** Technical specifications for prototyping the Internet-based application **(Volume II of the Generic Guidelines for implementing local information systems)**. This document provides general technical specifications that will have to be adapted to the local site specificities.

## TASK DIAGRAM

**I.1.4.**

Comparison between the requirements, according to activities 1.2 and 1.3 and the **(generic) Technical specifications for prototyping the Internet-based application.**  
**I.1.4.1**



Validation of the **specifics technical specifications with the board**  
**I.1.4.2**

**TASK CODE:** I.1.4.1.

***Comparison between the requirements, according to activities 1.2 and 1.3 and the (generic) Technical specifications for prototyping the Internet-based application.***

**ACTION CODE:** I.1.4.

ELABORATION OF TECHNICAL SPECIFICATIONS FOR THE LIS

## OBJECTIVE

The objective of the task I.1.4.1. **Comparison between the requirements, according to activities 1.2 and 1.3 and the (generic) Technical specifications for prototyping the Internet-based application** aims at determining:

- Points where generic specifications meet the needs.
- Points where generic specifications have to be modified, in order to meet the needs.

## METHODOLOGY

The comparison between the local needs and the **(generic) Technical specifications for prototyping the Internet-based application** divides itself into 4 points:

1. The **functional needs**. This document includes all the functionalities required by the stakeholders. It is based on the **Concept paper for improved information exchange practices based on users' expectations**. The generic technical specifications give a set of basic functions and a set of functions that can be added. Those functions should be sufficient. But if other functions are required (that aren't in the generic specific specifications), further analysis will have to be lead and the development phase duration can to be much longer. Besides, the specific technical specifications will include the different "information types" and the set of metadata adopted by the LIS manager during task 1.3. (We advice the number of document types not to exceed 5 documents).
2. The **corporate design**. Some common graphical features will characterize every local sites LIS Number and size of frames, Colours, (including background colours, text colours, etc), font and, size of text, logos, counter of visitors, etc. But the LIS prototype is meant to be adapted to each specific pilot site. So the local site have to define what design adaptation should be made (locals logos, colours changing...).
3. The **equipment requirement**. The generic technical specifications give the minimal equipment required to operate the LIS prototype, in terms of hardware of software. The needs outlined in previous actions may entail higher equipment needs, which have to be specified.
4. The **documentation**. The generic **user handbook** and the **manual of maintenance** may be adapted, to match the specificities of the LIS.

The comparison lead to the realization of the ["from generic to specific document" \(annex I.1.4.\)](#)

The **specific technical specifications for prototyping the Internet-based application** will have the same structure and frame than the **(generic) Technical specifications**. The **"from generic to specific document"** (which inventory every specific requirements) will allow to change the specifications as needed, in order to translate them into **specific technical specifications**.

The **specific technical specifications for prototyping the Internet-based application** are written in the language of the concerned country.

## HUMAN RESOURCES

Human resources necessary to carry out task I.1.4.1. are estimated to the equivalent of 2 staff/weeks

The responsible for task I.1.4.1 is the LIS manager. He should be assisted by the LIS assistant (or anyone else competent in the leading organization) , or/and the consultant specialized in information system

## FINANCIAL RESOURCES

Human resource cost of 2 staff/weeks

## EXPECTED OUTPUT:

The main output from task I.1.4.1. are the **"from generic to specific document"**, which is given in **annex I.1.4.** and the **specific technical specifications**.

---

## VALIDATION PROCESS

- Firstly, task I.1.4.1 is expected to be validated by the LIS project manager at the site level:
  - Secondly, the **specific technical specifications** are expected to be validated by the board of stakeholders (task I.1.4.2.)
-



**TASK CODE:** I.1.4.2.

## ***Validation of the specifics technical specifications with the board of stakeholders***

**ACTION CODE:** I.1.4.

ELABORATION OF TECHNICAL SPECIFICATIONS FOR THE LIS

### **OBJECTIVE**

The objective of task I.1.4.2 **Validation of the specifics technical specifications with the board of stakeholders** aims at checking that the output of step I.1.4.1 **specifics technical specifications** matches really their expectations. To reach this goal, a meeting of the board of stakeholders will be organized.

### **METHODOLOGY**

1. Two weeks before the meeting, a registered letter is sent to the members of the board, in order to invite them, and asking them to answer to the invitation before a deadline (e.g. Three days).
2. During this meeting, the output of task I.1.4.1. **(Specific technical specifications)** will be presented by the LIS manager (a demonstration can be presented during the meeting, in order to give the stakeholders a more concrete point of view of the future LIS).
3. After his intervention, the board will vote in order to validate or invalidate the document.
  - c. If the board agrees on the fact that the model matches reality, it's validated.
  - d. If the board invalidate the document, some changes will be brought to the output of task I.1.4.1. (By the responsible of the realization of this documents), in order to match their vision. Once the changes have been taken into account, the board of stakeholders will have to validate the document again: the process backs to 1. : Another meeting of the board has to be organized...

### **HUMAN RESOURCES**

The board of stakeholders, the LIS manager, the LIS assistant, and/or anyone else competent in the leading organization

### **FINANCIAL RESOURCES**

- Human resource cost of 1 staff/day
- Communication costs (which are expected to be low: sending of registered letters, phone call...).
- Organization of the meeting (coffee break...)

The costs can be multiplied by the number of meeting necessities to validate the documents.

### **EXPECTED OUTPUT**

- The final version of the **Specifics technical specifications**
- The **minutes** of the board meeting are written by the LIS assistant

### **VALIDATION PROCESS**

The minutes of the meeting are validated by the LIS manager.

<b>ACTION CODE:</b>	<b>I.1.5.</b>	<b>ASSESSMENT OF IMPLEMENTATION COSTS</b>
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<b>STEP CODE:</b>	<b>I.1.</b>	<b>FEASIBILITY AND PRE-DESIGN STUDY</b>
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## OBJECTIVE

The objective of the action I.1.5, assessment of implementation costs, is to approximate the LIS implementation costs, thanks to a tool provided to the LIS manager.

### I.1.5.

Determination of budgetary  
lines

**Task I.1.5.1**



Assessment of costs

**Task I.1.5.2**

<b>TASK CODE:</b>	<b>I.1.5.1.</b>	<b><i>Determination of the budgetary lines</i></b>
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<b>ACTION CODE:</b>	<b>I.1.5.</b>	<b>ASSESSMENT OF IMPLEMENTATION COSTS</b>
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## OBJECTIVE

The objective of the task I.1.5.1. is to inventory every budgetary line that will have to be considered during the implementation of the LIS.

## METHODOLOGY

The LIS manager and, for example (It can also be done with others person of the leading organisation), the person who realized the different investigations of action 1.2 to 1.4 (the LIS assistant) meet together.

1. They try to determine the different budgetary lines. The budgetary lines may vary from a site to another. For example, the following budget lines can be taken into account:
  - Meeting with all stakeholders (Communication costs (Phoning, Registered letters, Internet), multiplication of documents, Coffee break, human resources costs)
  - Adaptation of EUROSION prototype to match the requirements of the feasibility and pre-design study (Informatics service cost (IT firm, or internal):development, redaction of documents (User Handbook, manual of Maintenance))
  - Implementation (Informatics service cost (IT firm, or internal), Material: 1 server, 3 computers, 3 printers)
  - Tests: (Informatics service cost (IT firm, or internal))
  - Staff recruitment (communication and interviews cost)
  - Staff Training (Training costs, Human resources costs)
  - Marketing (Communication costs (Phoning, Registered letters, Internet), Office supplies, Human resources costs)
  - Maintenance and technical support (Maintenance, Technical support, Hosting)
2. Then, they distinguish operational costs and investment costs (We did it as an example in the **assessment of implementation costs table (annex I.1.5.)**)

## HUMAN RESOURCES

Human resources necessary to carry out task I.1.5.1. are estimated to the equivalent of 1 staff/day.

The responsible for task I.1.5.1 is the LIS manager. He should be assisted by the person who realized the different investigations of action 1.2 to 1.5 (the LIS assistant), and, if necessary, by other people of the leading organisation.

## FINANCIAL RESOURCES

Human resource cost of 1 staff/day

## EXPECTED OUTPUT:

The main output is the list of budgetary lines, with a distinction between investment and operational costs. It can be reported in a table, such as the **assessment of implementation costs table (annex I.1.5)**.

## VALIDATION PROCESS

Task I.1.5.1. is expected to be validated by the LIS manager at the local level (he signs the output).

<b>TASK CODE:</b>	<b>I.1.5.2.</b>	<b><i>Assessment of costs</i></b>
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<b>ACTION CODE:</b>	<b>I.1.5.</b>	<b>ASSESSMENT OF IMPLEMENTATION COSTS</b>
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## OBJECTIVE

The objective of the task I.1.5.2. is to approximate the costs of each step of the implementation of the LIS. The budgetary line previously inventoried will now be estimated.

## METHODOLOGY

The LIS assistant and the LIS manager (and other people of the leading organization if necessary) try now to estimate the costs.

They will report directly the estimated costs in the [assessment of implementation costs table \(annex I.1.5\)](#).

- If the LIS manager and the LIS assistant estimate all the costs during their meeting. The table is validated by the LIS manager and the task is over.
- If some Research and contact with suppliers or services providers are necessities, to estimate some costs, two options are possible:
  - Scenario 1: The LIS assistant (or some other person in the organization) will contact some of the following local actors (Property agencies, Suppliers of Office furniture and supplies, Human resource service of the leading organization (to identify the human resources costs), IT services firms, IT suppliers firms, ...), to fill in the gaps in the assessment table. For each category, different actors can be contacted, in order to have different sources for each budgetary line. The contact can be made: (1) by phone preferably, (2) by email, (3) or by an appointment.
  - Scenario 2: A specialized consultant is hired, in order to estimate the costs. This solution will be more expensive. The consultant leads a survey and reports the results to the LIS manager.

## HUMAN RESOURCES

Human resources necessary to carry out task I.1.5.1. are estimated to the equivalent of 2 staff/days

The responsible for task I.1.5. is the LIS manager. He should be assisted by the LIS assistant or by the consultant (and, if necessary, by other people of the leading organisation).

## FINANCIAL RESOURCES

Human resource cost of 2 staff/days (scenario 1) or cost of the consultation (scenario 2)

## EXPECTED OUTPUT

The expected output of task I.1.5.2 is the **assessment of implementation costs table**

## VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The responsible of task I.1.5.2 will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result of his work. The LIS manager will:
  - e. validate the document (in this case, the task is over)
  - f. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, takes an appointment...).

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## **STEP 2: IMPLEMENTATION**

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**ACTION CODE:**

**I.2.1.**

**KICK OFF MEETING WITH ALL STAKEHOLDERS**

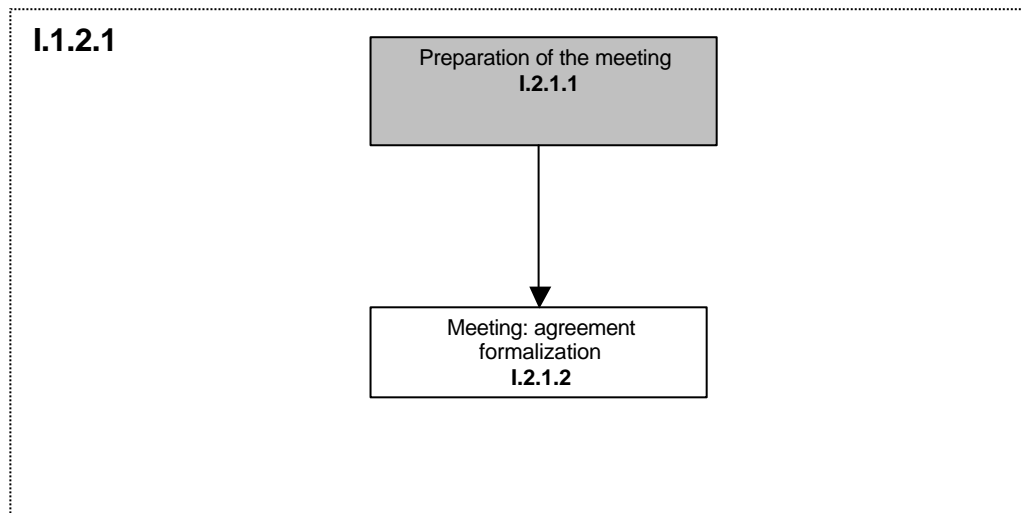
**STEP CODE:** I.2.

IMPLEMENTATION

## OBJECTIVE

The objective of the action I.2.1, **Kick off meeting with all stakeholders**, is to inform all stakeholders about the implementation of the LIS and formalize some agreements to share some data sources at the local level.

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.2.1.1.</b>	<b><i>Preparation of the meeting</i></b>
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<b>ACTION CODE:</b>	<b>I.2.1.</b>	<b>KICK OFF MEETING WITH ALL STAKEHOLDERS</b>
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### OBJECTIVE

The objective of the task I.2.1.1. **preparation of the meeting** is to ensure that the meeting with stakeholders is going to be a success.

### METHODOLOGY

The leading organization should use the following process, to prepare the meeting: (But another process can be used if it is relevant).

1. Two weeks before the meeting, a registered invitation letter is sent to each organization involved. The **memorandum of understanding** ([Annex I.2.1](#)) and the **budget** ([Annex I.1.5](#)) will be enclosed to the invitation. The **stakeholders matrix**, output of task I.1.2.2 will be used as an input, to build the “**stakeholders general meeting matrix**” ([Annex I.2.1bis](#)). The **stakeholders’ matrix** includes, for each organization, the name of a responsible, legally authorized to represent the organization. The letter will be sent to this person. Those people will have to answer to the invitation before a deadline (e.g. two weeks). Each organization potentially involved should be present at the meeting. If some organization doesn’t answer in times, the LIS assistant will call them by phone. If a person contacted can’t come, he has to be replaced by someone else in his organization.
2. Each answer will be reported in the “**stakeholder’s general meeting matrix**” ([Annex I.2.1bis](#)).
3. The LIS assistant will reserve a room, spacious enough for all the participants (their number may be a lot higher than the board’s of stakeholder one), and the necessities supplies to present the meeting (microphone, screen to project the PowerPoint presentation if necessary...) will be prepared.
4. The LIS manager will also have to prepare the intervention he will present during the meeting (presentation of the **memorandum of understanding** and of the **budget**).

### HUMAN RESOURCES

Human resources necessary to prepare the seminar is estimated to the equivalent of 0.5 staff/week.

The responsible for task I.2.1.1 should be the LIS assistant, or anyone else competent in the leading organization.

### FINANCIAL RESOURCES

Human resource cost of 0.5 staff/week

### EXPECTED OUTPUT:

The main output from task I.2.1.1. is the “**stakeholders general meeting matrix**” ([Annex I.2.1bis](#)).

### VALIDATION PROCESS

Task I.2.1.1. is expected to be validated by the LIS manager at the local level.

<b>TASK CODE:</b>	<b>I.2.1.2.</b>	<b><i>Meeting: agreement formalization</i></b>
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<b>ACTION CODE:</b>	<b>I.2.1.</b>	<b>KICK OFF MEETING WITH ALL STAKEHOLDERS</b>
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## OBJECTIVE

The objective of task I.2.1.2 aims at presenting and explaining to stakeholders the **memorandum of understanding (Annex I.2.1)** and the **financial plan (Annex I.1.5)**.

## METHODOLOGY

The meeting will be divided in 2 points:

1. **A formal agreement (possibly a memorandum of understanding)**
  - The memorandum is quickly presented by the LIS manager
  - The LIS manager answers to the stakeholders questions
2. **financial plan**
  - The financial plan is quickly presented by the LIS manager
  - The plan is discussed in order to determine “who is going to finance what”. An agreement has to be reached.
  - A vote is organized, in order to validate **budget**.
    - i. If the majority agrees, the plan is validated.
    - ii. If the stakeholders invalidate the document, some changes will be brought to it. Once the changes have been taken into account, the assembly of stakeholders will have to validate the document again: the process is back to I.2.1.1. : Another meeting has to be organized, in order to validate the financial plan...

At the end of the meeting, the stakeholders will sign, if they agree, the **memorandum of understanding**. The LIS assistant will report in the “**stakeholders general meeting matrix**” (**Annex I.2.1bis**) the organisations who signed the **memorandum of understanding**.

## HUMAN RESOURCES

Human resources necessary to carry out the meeting are estimated to the equivalent of 1 staff/day.  
The responsible for task I.2.1.2 should be the LIS manager and the LIS assistant.

## FINANCIAL RESOURCES

Human resource cost of 1 staff/day

## EXPECTED OUTPUT

The expected output of task I.2.1.2 is the **formal agreement** signed by each organisation and the validated budget.

## VALIDATION PROCESS

Task I.2.1.2. is expected to be validated by the LIS manager at the local level.



**ACTION CODE:**

**I.2.2.**

**ADAPTATION OF EUROSION PROTOTYPE TO MATCH THE  
REQUIREMENTS OF THE FEASIBILITY AND PRE-DESIGN STUDY**

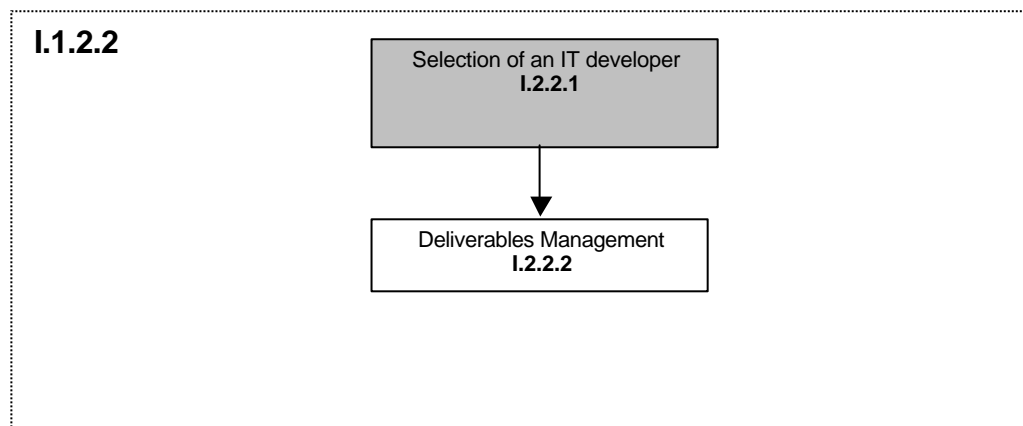
**STEP CODE:** I.2.

IMPLEMENTATION

## OBJECTIVE

The objective of the action I.2.2, **Adaptation of EUROSION prototype to match the requirements of the feasibility and pre-design study**, is to develop the LIS. The work will have to take into account the specific specifications, which has been determined during step 1. During this phase, the conception, which has been previously established, will concretize itself into software programming.

## TASK DIAGRAM



**TASK CODE:** I.2.2.1.

## ***Selection of an it developer***

**ACTION CODE:** I.2.2.

ADAPTATION OF EUROSION PROTOTYPE TO MATCH THE REQUIREMENTS OF THE FEASIBILITY AND PRE-DESIGN STUDY

### **OBJECTIVE**

The objective of the task I.2.2.1. **Selection of an IT developer** is to find a person or an organization, able to adapt the LIS to the specificities of the local site, which have been previously determined. He will base his work on the **specific technical specifications**.

### **METHODOLOGY**

The IT firm should encompass the following profiles:

(i) Development

- Analyst, programmer, computer scientist, or equivalent profile
- Minimum 2 years of experience in development of Web applications
- Knowledge and confirmed experience of UML, HTML, of XML and XML based technologies
- Knowledge and confirmed experience in metadata management and knowledge management
- Knowledge and experience of development tools

(ii) Architecture

- Experience in hardware installation (low priority)

(iii) Training

- Experience in change management and staff training
- Motivation and good communication skills

The level of competences required can be adapted to the specificities of each case (depending of the level of complexity of the future LIS).

1. If someone in the leading organization has got the competencies requires, the LIS can be developed internally.

An internal development ensures that the developer have a good comprehension of the coastal management issues, and of the LIS conception issues. He is quickly available if needed.

2. If the leading organization hasn't got sufficient competencies, it will have to hire a **local** IT developer to do the job. The traditional means of goods or services purchase of the organization will be used.

For example, the process can be the following:

- Launching of a call offer
- Selection of a short list of three local companies, which will be make an offer
- Examination of the offers
- Selection of the developer

An external development ensures that the developer has the required technical capacities. Moreover, he must lead his mission successfully, to be paid.

The leading organization can use the ["IT competence matrix" \(Annex I.2.2\)](#), as a help for decision tool.

### **HUMAN RESOURCES**

Human resources necessary to select the IT developer are estimated to the equivalent of 0.5 staff/week

The responsible for task I.2.2.1 should be the LIS manager and the LIS assistant and/ or anyone else competent in the leading organization.

### **FINANCIAL RESOURCES**

-Human resource cost of 0.5 staff/week

-The contract cost (which depends on the complexity of the LIS...)

---

## EXPECTED OUTPUT

The main output from task I.1.1.1. is the **contract signed**.

---

## VALIDATION PROCESS

Task I.2.2.1. is expected to be validated by LIS manager at the local level

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**TASK CODE:**

**I.2.2.2.**

## ***Deliverables management***

**ACTION CODE:** I.2.2.

ADAPTATION OF EUROSION PROTOTYPE TO MATCH THE REQUIREMENTS OF THE FEASIBILITY AND PRE-DESIGN STUDY

### **OBJECTIVE**

The objective of task I.2.2.2, **deliverables management**, is to manage efficiently the developer's work, and to define correctly its deliverables and timing.

All the deliverables and the timing necessary to make them available have to be forecasted before the beginning of the development.

### **METHODOLOGY**

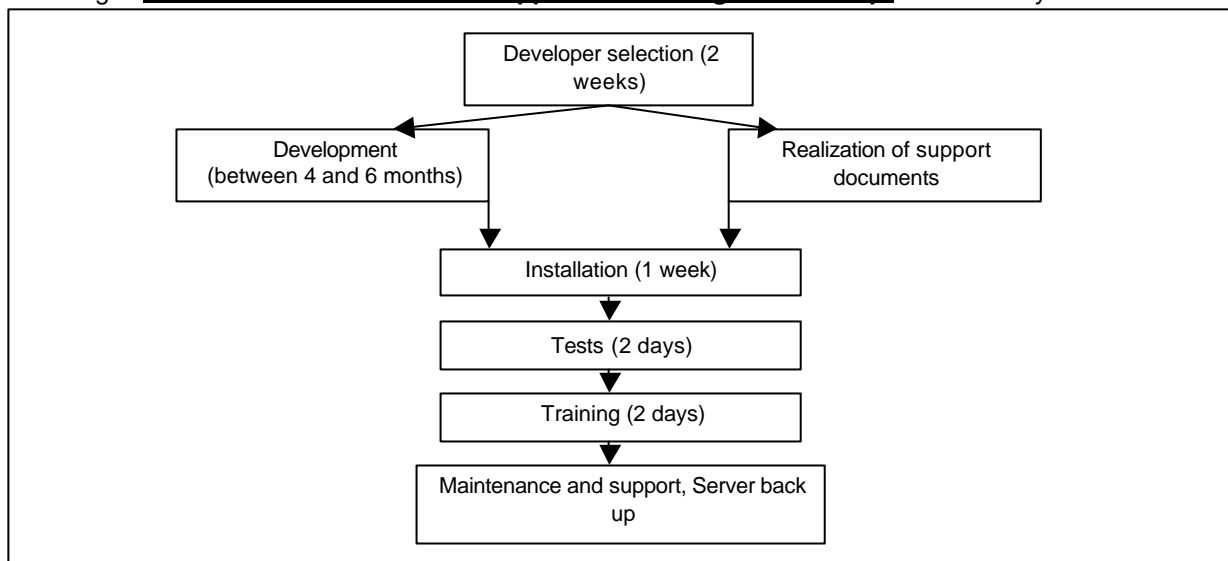
The LIS manager will monitor the work of the developer. He will ensure that his work matches the generic and specific specifications. The key factor of a successful programming is the coherence between the conception and the development. The LIS manager will review the developer reports and explain him, whenever it's necessary, all the conception issues.

The following deliverables are expected from the developer :

- Periodic progress report, presented and explained to the LIS manager during the development phase (every two weeks)
- Provision of the software package necessary for the LIS to be operational (at the end of the development phase, which should last between 4 and 6 months)
- Provision of the documentation: user handbook, manual of maintenance (It must be available before the implementation)
- Installation of the system (which can last between 2 days and a week)
- Tests (2days). They will be made in presence of the LIS manager.
- Training (2days).

At this point, the internet site must **be on line, hosted, and operational**.

- Maintenance and technical support, server regular back up:** continuously.



### **HUMAN RESOURCES**

The LIS manager will monitor the deliverables during a period of 5-7 months. (It may vary and depends on the complexity of the LIS)

### **FINANCIAL RESOURCES**

—

### **EXPECTED OUTPUT**

The expected output are the deliverables of each phase

---

## VALIDATION PROCESS

The different deliverables are expected to be validated by the LIS manager expected to be validated by LIS manager at the local level

**ACTION CODE:**

**I.2.3.**

**INSTALLATION AND TEST PHASE**

**STEP CODE:** I.2.

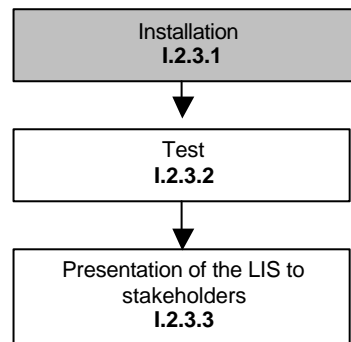
IMPLEMENTATION

## OBJECTIVE

The objective of the action I.2.3, **installation and test phase**, is to make available for users the product previously conceived and developed, and to ensure that it is operational. Concretely speaking, the site will be available online and a set of tests are going to be undertaken.

## TASK DIAGRAM

**I.2.3.**



<b>TASK CODE:</b>	<b>I.2.3.1.</b>	<b><i>Installation</i></b>
<b>ACTION CODE:</b>	<b>I.2.3.</b>	<b>IMPLEMENTATION AND TEST PHASE</b>

### OBJECTIVE

The objective of the task I.2.3.1. is to install all the software and hardware necessary for the Internet based application to be operational. The nature of the tasks will vary from a local site to another.

### METHODOLOGY

The developer will be responsible for the installation of the system. During the installation, he must report to the LIS manager the eventual problems he encounters.

### HUMAN RESOURCES

Human resource necessary to carry out the installation is estimated to the equivalent of 1 staff/week. The responsible for Task I.2.3.1. is the developer, under the lead of the MIS manager.

### FINANCIAL RESOURCES

- The costs of the implementation is included in the informatics services total cost.
- In case of internal implementation, human resource cost is estimated to the equivalent of 1 staff/week

### EXPECTED OUTPUT:

The internet tool is available online and ready to be tested.

### VALIDATION PROCESS

Task I.2.3.1. is expected to be validated by LIS manager at the local level

<b>TASK CODE:</b>	<b>I.2.3.2.</b>	<b>Tests</b>
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<b>ACTION CODE:</b>	<b>I.2.3.</b>	<b>IMPLEMENTATION AND TEST PHASE</b>
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## OBJECTIVE

The objective of task I.2.3.2 is to ensure that all the functionalities of the LIS correctly run. To meet this goal, the different functions of the LIS will be tested by the developer, in presence of the LIS manager or the LIS assistant.

## METHODOLOGY

The following tests will be undertaken, and the results will be reported in the [test table \(annex I.2.3.2\)](#).

1. Check that minimum hardware/ software required is available
2. Management of the system (1)
  - a. Select a language (administration)
  - b. Create a user profile (repeat all the following operations for each kind of user profile) (administration)
  - c. Modify it (administration)
  - d. Create a forum (administration)
3. Participating to Forums
  - a. Post a message to the forum created (user)
  - b. Read it (user)
  - c. Delete the forum (administration)
4. Upload information:
  - a. Edit and save metadata new records. (user)
  - b. Attach to the record a set of keywords from the thesaurus, information about the temporal coverage, the spatial coverage, the use constraints...: fill all the fields. (user)
  - c. Attach to the record a data file, Define the access rights to download or view such a data file. (user)
5. Download information
  - a. Use the search engine to find the data you have downloaded, using: the temporal feature, the spatial feature (by typing a location and by selecting a location from the list and by delimiting the area on the map), the keywords (by typing it, and by selecting it from the list)... (user)
  - b. Select your data (user)
  - c. View it with an appropriate viewer (Word, Excel, etc.) (user)
  - d. Download it (user)
6. Consult the definition of a specific term via the interactive glossary (user)
7. Management of the system (2)
  - a. Modify the metadata record (administration)
  - b. Transfer of metadata, and data towards EUROSION server. (administration)
  - c. Delete the metadata record (administration)
  - d. Modify the user profile (administration)
  - e. Delete the user profile (administration)
  - f. Access control and security tests (For each type of access right, the tester try to reach pages that are normally forbidden. If he can reach them, the test has failed. If a message "you haven't the required rights for this page" appears, the test is successful).

The tests have to be adapted to the functions chosen for the LIS

If all the tests are successful, the LIS manager validates the **test table**. If a test is unsuccessful, the developer undertakes corrective measures and the LIS is once again tested (back to the beginning of the task).

## HUMAN RESOURCES

Human resources necessary to carry out the tests collection survey are estimated to the equivalent of 2 staff days/ one staff week, depending on the results of the tests.

The responsible for the test is the IT developer, under the lead of the LIS manager.



---

## FINANCIAL RESOURCES

-The costs of the implementation is included in the informatics services total cost.

-In case of internal implementation, human resource cost is estimated to the equivalent of 2 staff days/ one staff week, depending on the results of the tests.

---

## EXPECTED OUTPUT

The expected output of task I.2.3.2 is **Test table** (annex I.2.3.2).

---

## VALIDATION PROCESS

Task I.2.3.2. is expected to be validated by LIS manager at the local level

**TASK CODE:** I.2.3.3.

## ***Presentation of the LIS to stakeholders***

**ACTION CODE:** I.2.3.

### **IMPLEMENTATION AND TEST PHASE**

#### **OBJECTIVE**

The objective of task I.2.3.3 is to bring to the stakeholders an overview of what the LIS will be, in order to ensure that it matches their needs.

#### **METHODOLOGY**

The meeting is organized by the IT developer and by the LIS manager (and/or the LIS assistant).

1. The LIS assistant and the IT firm determine a date for the presentation.
2. A registered letter should be sent to each partner one month before the presentation, explaining them the goal of the presentation and inviting them. A deadline has to be fixed (e.g. 2 weeks after the sending of the letter) for the answers.
3. The LIS assistant should reserve the room at least two weeks before the training. The presentation can take place in the IT firm, or in the leading institution, or in a subscribing institution. Only one computer is necessary for this presentation. The room should be tall enough for the representatives of every stakeholder.
4. During the meeting, the IT developer (or the LIS manager) gives an overall presentation of the LIS: he shows to the assembly the main functions of the system.
5. At the end of the meeting, a vote is organized, to ask stakeholders if, according to them, the LIS matches the specific technical specifications.
  - If they agree, activity I.2.3 is over
  - If they disagree, some changes are brought to the LIS and a new presentation session is organized...

#### **HUMAN RESOURCES**

Human resources necessary to carry out the preparation of the presentation and the preparation is estimated to the equivalent of 3 staff days

The responsible for the presentation is the LIS manager or the IT developer.

#### **FINANCIAL RESOURCES**

-Human resource cost of 3 staff days

#### **EXPECTED OUTPUT**

The expected output of task I.2.3.3 is the result of the vote and the minutes of the presentation meeting.

#### **VALIDATION PROCESS**

Task I.2.3.2. is expected to be validated by the LIS manager at the local level

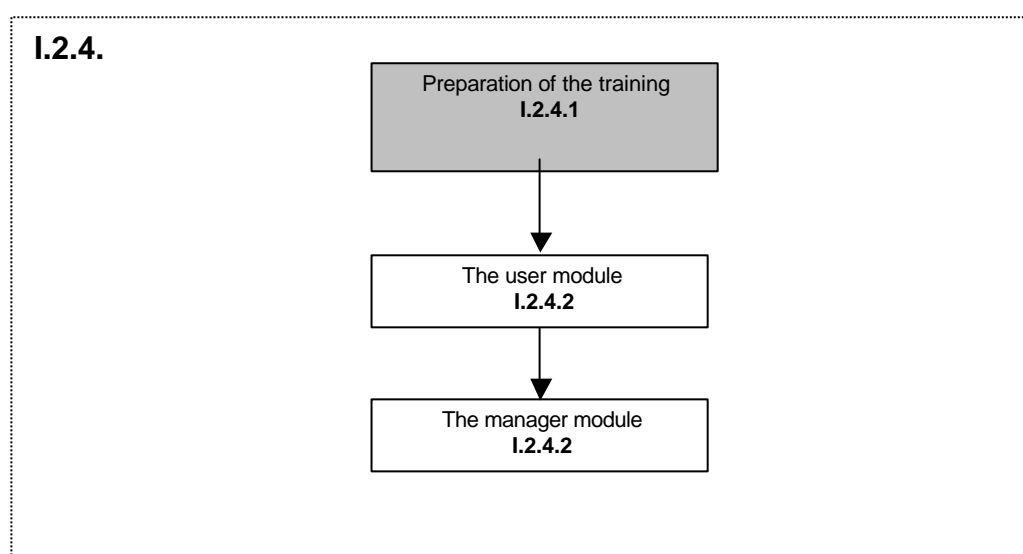
<b>ACTION CODE:</b>	<b>I.2.4.</b>	<b>STAFF TRAINING</b>
<b>STEP CODE:</b>	<b>I.2.</b>	<b>IMPLEMENTATION</b>

## OBJECTIVE

The objective of the action I.2.4, **staff training**, is to ensure that all the future user of the LIS, coming from the different institutions subscribing to the LIS will be able to efficiently use the system, and that the future administrators, from the leading institution, will be able to administrate efficiently the system. Two different formation modules have to be distinguished:

1. The user module
2. The manager module

## TASK DIAGRAM



**TASK CODE:** I.2.4.1.

## ***Preparation of the training***

**ACTION CODE:** I.2.4.

STAFF RECRUITMENT AND TRAINING

### **OBJECTIVE**

The objective of the task I.2.4.1. **preparation of the training** is to ensure that all the logistics needs of such a training are taken into account.

### **METHODOLOGY**

The following process should be used, to prepare the training: (But another one can be used if it is relevant).

The training is preferably undertaken by the IT firm which developed the tool, (or by the LIS manager, if he has been trained before by the IT firm for it).

1. The LIS assistant and the IT firm (if needed) determine a date for each module.
2. A registered letter should be sent to each organization one month before the training, inviting her to the first module. A deadline has to be fixed (e.g. 2 weeks after the sending of the letter) for the answers.

Option: If too much capacity differences are reported between future LIS users (the LIS survey gives some indication on that point), two different kind of training can be organized: one for the person who are familiar with information systems, one for the others. The second one could include a quick introduction to standard office and Internet tools. In this case, the registered later will also ask the session required by each user.

3. The LIS assistant should reserve the room at least two weeks before the training. The training can take place in the IT firm, or in the leading institution, or in a subscribing institution. It must take place in a room with a large number of computers. There shouldn't be more than 2 users by computer. This issue is particularly important for the first module, where they might be a lot of participants. If there are more than 30 person interested by the training, several training sessions have to be organized, for the module 1. For the second module, the training can take place in the IT firm, or in the leading institution.

### **HUMAN RESOURCES**

Human resources necessary to prepare the training session is estimated to the equivalent of 3 staff-days.

The responsible for task I.2.4.1 should be the LIS assistant, or anyone else competent in the leading organization.

### **FINANCIAL RESOURCES**

- Human resource cost of 3 staff-days
- Location of the room (if needed)

### **EXPECTED OUTPUT**

- The list of participants for each module, and, if needed, for each session of module 1.
- The reservation of the room

### **VALIDATION PROCESS**

Task I.2.4.1. is expected to be validated by the LIS manager at the local level (He signs the list of participants).

<b>TASK CODE:</b>	<b>I.2.4.1.</b>	<b><i>The user module</i></b>
<b>ACTION CODE:</b>	<b>I.2.4.</b>	<b>STAFF RECRUITMENT AND TRAINING</b>

## OBJECTIVE

The objective of the task I.2.4.1. **the user module** is to empower the competences of the futures users of the LIS, in order to ensure that they will be able to use efficiently the LIS (i.e. uploading, searching and downloading information, using the forums...). It includes the users from the different institutions subscribing to the LIS and the users from the leading institution (which also includes the managers, who must know how the system works for a user and who can also be users themselves).

## METHODOLOGY

Each user has to try to execute himself each task that will be presented to him during the training session. The training is concrete. After a brief presentation of the tools and of the planning of the module, all the training is led as a practical work with the Internet based tool. The trainer must ensure that the training is interactive, and that each user participates. The module is divided into two parts:

### 1. Part 1: Uploading information (3-4 hours)

- a. Edit and save metadata new records.
- b. Attach to the record :
  - a set of keywords from the thesaurus,
  - information about the temporal coverage,
  - the spatial coverage,
  - the use constraints....
- c. Attach to the record a data file,
- d. Define the access rights to download or view such a data file.

### 2. Part 2: Downloading information and participation to forums (3-4 hours)

- a. Downloading information
  - Use the search engine to find the data you have downloaded, using: the temporal feature, the spatial feature (by typing a location and by selecting a location from the list and by delimiting the area on the map), the keywords (by typing it, and by selecting it from the list)...
  - Select your data
  - View it with an appropriate viewer (Word, Excel, etc.)
  - Download it
- b. Participation to forums
  - Post a message to the forum created
  - Read it

-Option: At the end of each part, a small test could allow to ensure that people are ready to use the LIS (testing the ability of people to use each function of the LIS). A third part could be organized for people who didn't do the test successfully.

-The content of the lessons can be adapted to the specificities of LIS functionalities.

-It can also be adapted on users technical capacities (see result of the LIS survey). If people have high technical capacities, the training can be shorter than 3 or 4 hours per session. If they have low technical capacity, the training can be longer.

## HUMAN RESOURCES

Human resources necessary to train the users are estimated to the equivalent of 1 staff/day  
The responsible for task I.2.4.1 should be the IT developer, or the LIS manager.

## FINANCIAL RESOURCES

-Training cost is included in the informatics services total cost.

-In case of internal training, human resource cost is estimated to the equivalent of 1 staff/day.

---

### EXPECTED OUTPUT

- The “presence paper”, where each user sign at the beginning of each part of sessions.
- A LIS certificate (optional), proving that the user have been trained and is able to use the LIS.

---

### VALIDATION PROCESS

Task I.2.4.1. is expected to be validated by the LIS manager at the local level (He signs each LIS certificate and the completed presence paper).

---

<b>TASK CODE:</b>	<b>I.2.4.2.</b>	<b><i>The manager module</i></b>
<b>ACTION CODE:</b>	<b>I.2.4.</b>	<b>STAFF RECRUITMENT AND TRAINING</b>

## OBJECTIVE

The objective of task I.2.4.2 **the manager module** is to empower the competences of the LIS manager and other(s) people(s) of the leading institution potentially involved in the management of the LIS (the LIS assistant...)

## METHODOLOGY

This training module is undertaken by the IT firm which developed the tool. **The module last 34 hours.** The following points are going to be tackled:

1. Select the language for the criteria of search, the interface, and the glossary
2. Modify or delete existing metadata records
3. Create or delete a new forum
4. Create, modify, delete user profiles with specific access rights (rights to search for data, to view or download data themselves, to upload new information, to participate a forum)
5. Create, modify, delete new users within each user profile
6. Transfer of metadata, and data towards EUROSION server.

-Option: At the end of each part, a small test could allow to ensure that people are ready to use the LIS (testing the ability of people to use each function of the LIS). A third part could be organized for people who didn't do the test successfully.

The content of the lessons can be adapted to the specificities of a LIS functionalities

## HUMAN RESOURCES

Human resources necessary to train the users are estimated to the equivalent of 0.5 staff/days  
The responsible for task I.2.4.1 should be the IT developer.

## FINANCIAL RESOURCES

Training cost is included in the informatics services total cost.

## EXPECTED OUTPUT

-The "presence paper", where each user sign at the beginning of each part of session.  
-A LIS certificate (optional), proving that the future manager or administrator have been trained and is able to manage the LIS.

## VALIDATION PROCESS

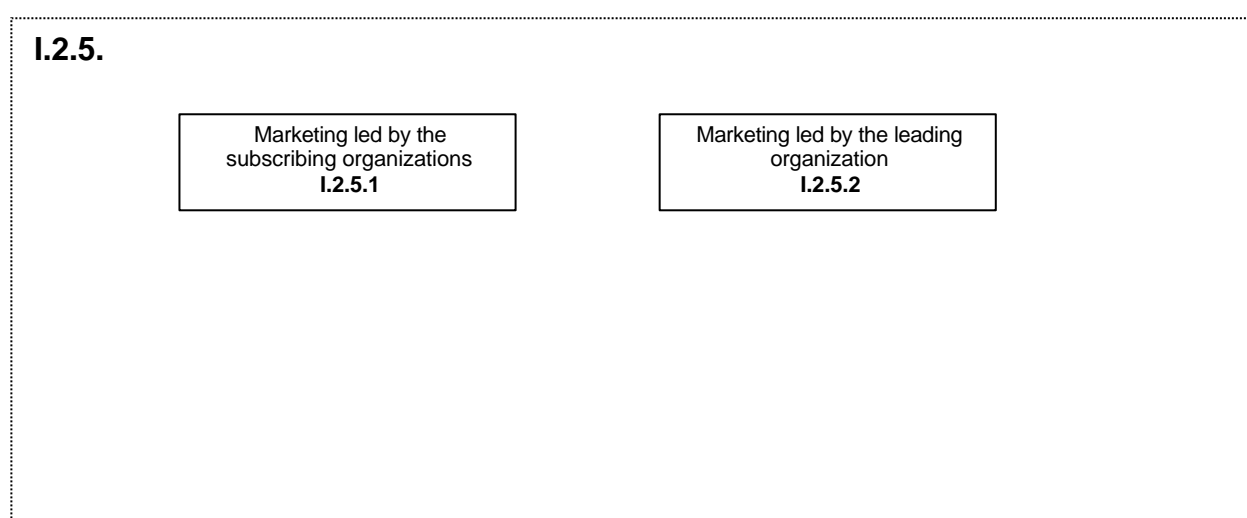
Task I.2.4.1. is expected to be validated by the LIS manager at the local level (He signs each LIS certificate and the completed presence paper).

<b>ACTION CODE:</b>	<b>I.2.5.</b>	<b>MARKETING</b>
<b>STEP CODE:</b>	<b>I.2.</b>	<b>IMPLEMENTATION</b>

## OBJECTIVE

The objective of the action I.2.5, **Marketing**, is to propose some practical marketing initiatives to be undertaken by the leading institution to ensure a broad level of communication and information about the LIS. This point is necessary to manage efficiently the change brought by the LIS. A focus has to be made on it during the implementation phase. A first communication effort has been led during the training action. A second one has to be undertaken during the marketing action.

## TASK DIAGRAM





<b>TASK CODE:</b>	<b>I.2.5.1.</b>	<b><i>Marketing led by the subscribing organizations</i></b>
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<b>ACTION CODE:</b>	<b>I.2.5.</b>	<b>MARKETING</b>
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### OBJECTIVE

The objective of the task I.2.5.1. is to promote the utilization of the LIS inside the subscribing organizations. The training has already been a first step for some of the employees, but an efficient internal marketing should be undertaken.

---

### METHODOLOGY

The LIS manager (or someone else in the leading organization) can contact (phone, mail, email) the subscribing organizations and invite them to lead an internal promotion about the LIS

- Some employees of the subscribing organizations have already been trained. They can present the LIS to other potential interested.
- An email can be sent to all the organizations employees, in order to inform them of the subscription.
- Internal trainings can be organized
- A link toward the LIS can be inserted on the intranet of the organization
- The user handbook can be inserted on the intranet of the organization
- Others relevant measures can be undertaken

---

### HUMAN RESOURCES

Human resources necessary to identify the target actors is estimated to the equivalent of 2 staff/ days. The responsible of task I.2.5.1. should be the LIS manager (or anyone else competent in the leading organization) , which encourages the subscriptions organizations to promote the LIS internally.

---

### FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of 2 staff/ days

---

### EXPECTED OUTPUT

The main output from task I.2.5.1. is the internal promotion of the LIS in subscribing organisations.

---

### VALIDATION PROCESS

If the responsible of the task is not the LIS manager, he has to report him the results of his steps.

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<b>TASK CODE:</b>	<b>I.2.5.2.</b>	<b><i>Marketing led by the leading organization</i></b>
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<b>ACTION CODE:</b>	<b>I.2.5.</b>	<b>MARKETING</b>
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## OBJECTIVE

The objective of task I.2.5.2 is to promote the use of the LIS. A “push” has to be carried out by the leading organization at the launch of the LIS.

---

## METHODOLOGY

- The LIS manager, the LIS assistant (or someone else in the leading organization) can regularly encourage stakeholders to participate to the LIS and its forums (please see Task 1.3.5.1). Those encouragements can be led by phone, or by email. They are necessary to allow the take off of the LIS.
- A newsletter can be sent to the stakeholders. This newsletter would encompass updated information about the LIS (the data provided, the new subscribers, the technical improvements, news on different coastal management issues...). This newsletter would also encourage stakeholders' participation on the LIS and the forums, especially after the opening of the LIS.
- Each Stockholder's Internet site should encompass an attractive link toward the LIS.
- Others communication tool can be implemented (e.g. leaflet, such as Eurosion ones). The right communication tool and the adapted message depend on the local site specificities.
- If needed, some communication will be made to bring information about the LIS to the public. This can be done by different means:
  - Radio
  - TV
  - Newspaper
  - Workshops
  - ...
- Others relevant measures can be undertaken

---

## HUMAN RESOURCES

Human resources necessary to implement the communication campaign at the launch of the LIS is estimated to the equivalent of one staff week. The responsible should be the LIS manager, the LIS assistant (or someone else in the leading organization).

---

## FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of one staff week

---

## EXPECTED OUTPUT

The expected output of task I.2.5.2 is an active participation of stakeholders at the LIS beginning. It can be measured by the number of visits of the visit (objective can be fixed).

---

## VALIDATION PROCESS

The LIS manager ensures that the expected output matches the objective.

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## **STEP 3: MANAGEMENT AND MAINTENANCE**

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**ACTION CODE:**

**I.3.1.**

**SUBMISSION AND RESIGNATION PROCEDURES**

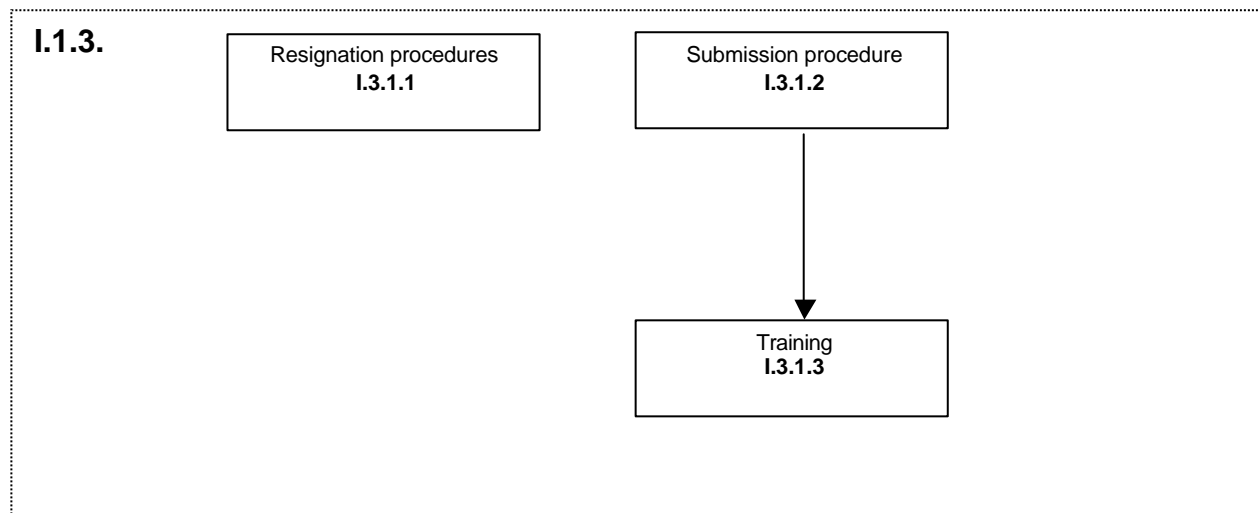
**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

Once the LIS is operational, some new organizations might be interested in it. Besides, for various reasons, some organisations which had subscribed to the LIS may want to resign. Those organisations will have to fill some specific form and send them to the leading organization.

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.3.1.1.</b>	<b><i>Resignation procedure</i></b>
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<b>ACTION CODE:</b>	<b>I.3.1.</b>	<b>SUBMISSION AND RESIGNATION PROCEDURE</b>
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## OBJECTIVE

All the firms which subscribed to the LIS have the right, whenever they want to quit it. Task 1.3.1.1 objective is to formalize this resignation, and to understand the main causes if the resignation.

---

## METHODOLOGY

-An organization who wants to resign from the LIS must:

1. Fill the [resignation form \(annex I.3.1\)](#).
2. Send it with a registered covering letter to the leading organization

-The leading organization must:

1. Record the resignation and the reasons for resignation
2. Study the reason for resignation and give a phone call to the organization, to ensure that the problems who lead the organization to resign can't be solved.
  - a. If, it can't be solved and if the organization confirm the resignation:
    - i. Delete the concerned organization user's profile (in a minimum delay of 3 days)
    - ii. Send a registered letter to the resignation organization, confirming the resignation
  - b. If it can be solved and if the organization agrees, take off the resignation

---

## HUMAN RESOURCES

Human resources necessary to record and confirm the resignation is estimated to the equivalent of 0.5 staff day. The responsible for this task should be the LIS assistant.

---

## FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of 0.5 staff day.

---

## EXPECTED OUTPUT

The main output from task I.3.1.1 is the filled **resignation form (annex I.3.1)**.

---

## VALIDATION PROCESS

The **resignation form** is validated by the LIS manager, who ensures that the LIS assistant has checked that the resignation is not based on a mistake or a misunderstanding.

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<b>TASK CODE:</b>	<b>I.3.1.2.</b>	<b><i>Submission procedure</i></b>
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<b>ACTION CODE:</b>	<b>I.3.1.</b>	<b>SUBMISSION AND RESIGNATION PROCEDURE</b>
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## OBJECTIVE

The objective of task I.3.1.2 is to define the process of accessing to the LIS for a new organization

---

## METHODOLOGY

-An organization who wants to submit to LIS must:

1. Ask the leading organization to provide her a [submission form \(annex I.3.1bis\)](#).
2. Fill the **submission form (annex I.3.1)**.
3. Send it with a registered covering letter to the leading organization

-The leading organization must:

1. Record the submission, and the information about the submitting organisation
2. Contact the organization, to invite her to a training session if she's interested (**please, see task I.3.9**)
3. Create the concerned organization user's profile (in a minimum delay of 3 days)
4. Send a registered letter and an email, to confirm her subscription, and providing him his login and password

---

## HUMAN RESOURCES

Human resources necessary to record and confirm the subscription is estimated to the equivalent of 0.5 staff day.  
The responsible for this task should be the LIS assistant.

---

## FINANCIAL RESOURCES

Human resource cost of 0.5 staff day

---

## EXPECTED OUTPUT

The main output from task I.3.1.1 is the filled **submission form (annex I.3.1bis)**.

---

## VALIDATION PROCESS

The **submission form** is validated by the LIS manager

---

**ACTION CODE:**

**I.3.2.**

**ARBITRATION PROCEDURES IN CASE OF CONFLICT**

**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of the action I.3.2 is to determine a standard process to be followed in case of conflict, in order to try to resolve it.

## TASK DIAGRAM

**I.3.2.**

Identification of the conflict  
nature and contact with  
concerned organization



If necessary, vote of the  
general stakeholders'  
assembly  
**I.3.2.3**

**TASK CODE:** I.3.2.1.

## ***Identification of the nature of the conflict and contact with concerned organizations***

**ACTION CODE:** I.3.2.

ARBITRATION PROCEDURE IN CASE OF CONFLICT

### **OBJECTIVE**

The objective of this task is for the leading organization to take into account the conflict, identify the concerned actors and the nature of the problem.

### **METHODOLOGY**

For various reasons, there can be conflicts between LIS stakeholders, or between an organization external to the LIS and LIS stakeholders. In case of conflict, the first thing to do is to submit the problem to the leading organization.

Once she has been acknowledged of the problem, we suggest the following process to be operated :

- The LIS manager will:

1. Identify its nature (economical, legal, technical, politic...), and report in the [conflict form \(Annex I.3.2.\)](#) the required information. All the conflicts forms are stored in a **conflict file**.
2. Check in the conflict file if such a conflict has already occurred. It can help to resolve it.
3. Send the **conflict form by email** to Eurocion responsible at a higher level and contact him directly by phone, to check that such a conflict hasn't occurred in another country before.
4. Contact the stakeholders involved in the conflict and take an appointment with them.
5. Try to solve the problem directly with them.
  - a. If the conflict is solved, the task is over
  - b. If the problem isn't solved at this level, and as a last resort, please go to next task.

### **HUMAN RESOURCES**

The human resource necessary to identify the conflict and meet the concerned actors is estimated to the equivalent of 0.5 staff/ day (It may vary a lot, depending on the nature of the conflict).

### **FINANCIAL RESOURCES**

Human resource cost of 0.5 staff/ day

### **EXPECTED OUTPUT**

The main output from task I.3.2.1.. is the conflict form.

### **VALIDATION PROCESS**

The conflict form must be signed by the LIS manager (or anyone else competent in the leading organization)



**TASK CODE:** I.3.2.2.

## ***Special meeting with all stakeholders***

**ACTION CODE:** I.3.2.

ARBITRATION PROCEDURE IN CASE OF CONFLICT

### **OBJECTIVE**

The objective of task I.3.2.2 is to resolve the conflict, if it hasn't been done previously. This task should be exceptional and should be led when no other way to resolve a conflict has been found and when the conflicts importance is major.

### **METHODOLOGY**

The following process should be operated. (But another last resort process can be used if it is relevant).

1. A special meeting with stakeholders is organized (please see task I.2.1 for the organization of meeting).
2. The problem is presented by the LIS manager.
3. A debate is led, with the stakeholders concerned by the conflict and the other.
4. A vote is organized, and the assembly takes a decision to resolve the conflict.

### **HUMAN RESOURCES**

Human resources necessary to carry out the special meeting (preparation + meeting) is estimated to the equivalent of 3 staff days.

### **FINANCIAL RESOURCES**

Human resource cost 3 staff days

### **EXPECTED OUTPUT**

The expected output of task I.3.2.2 is the result of the vote and the meeting minutes.

### **VALIDATION PROCESS**

Task I.3.2.2 will be validated by the LIS manager at the local level (or anyone else competent in the leading organization).

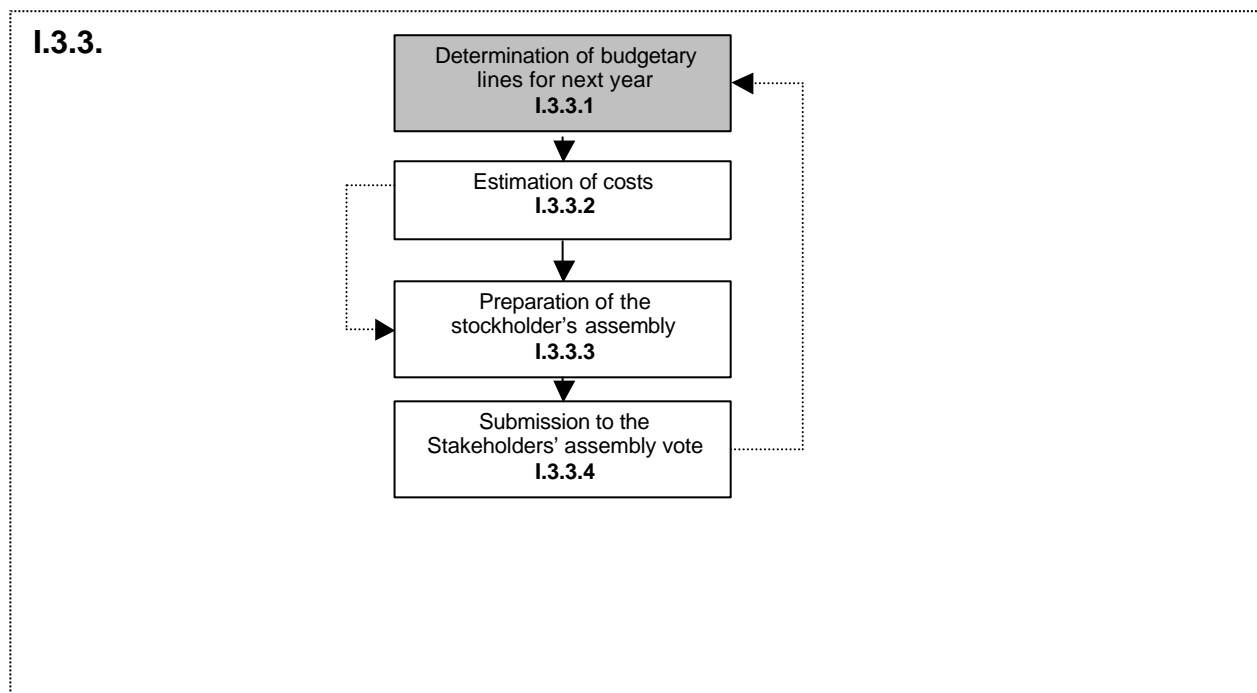
**ACTION CODE:****I.3.3.****ANNUAL BUDGET PLANNING PROCEDURES****STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of the action I.3.3, is to forecast, at the end of each year of operation of the system, the budget of next year. The methodology is the same as the one used for the implementation cost assessment.

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.3.3.1.</b>	<b><i>Determination of budgetary lines for next year</i></b>
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<b>ACTION CODE:</b>	<b>I.3.3.</b>	ANNUAL BUDGET PROCEDURES
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## OBJECTIVE

The task I.3.3.1. **Determination of budgetary lines for next year** is the first step toward preparing the forecasted budget for the next year.

---

## METHODOLOGY

The LIS manager and, for example (it can also be done with others person of the leading organisation), the person who realized the different investigations of action 1.2 to 1.4 (the LIS assistant) meet together.

They try to determine the different budgetary lines. The budgetary lines may vary from a site to another. For example, the following budget lines can be taken into account, for the operation of the system:

- Meeting with all stakeholders (Communication costs (Phoning, Registered letters, Internet), Multiplication of documents, Coffe break, Human resources costs),
- Staff training: Training costs (IT firm or LIS manager), Human resources costs,
- Marketing: Communication costs (Phoning, Registered letters, Internet), Human resources costs
- Maintenance and support (Maintenance, Technical support, Hosting)

Once the operating budgetary lines have been determined once, they shouldn't vary a lot.

---

## HUMAN RESOURCES

Human resources necessary to carry out task I.3.3.1. are estimated to the equivalent of 1 staff/day.

The responsible for task I.3.3.1. should be the LIS manager. He should be assisted by the LIS assistant, and, if necessary, by other people of the leading organisation.

---

## FINANCIAL RESOURCES

Human resource cost of 1 staff/day

---

## EXPECTED OUTPUT

The main output from task I.3.3.1. is the **list of budget lines to be taken into account** for the budget plan

---

## VALIDATION PROCESS

Task I.3.3.1. is expected to be validated by the LIS manager at the local level, or anyone else competent in the leading organization, (he signs the output).

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<b>TASK CODE:</b>	<b>I.3.3.2.</b>	<b><i>Estimation of costs</i></b>
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<b>ACTION CODE:</b>	<b>I.3.3.</b>	ANNUAL BUDGET PROCEDURES
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## OBJECTIVE

The objective of task I.3.3.2 is to approximate the costs of each lines previously inventoried.

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## METHODOLOGY

The LIS assistant and the LIS manager (and other people of the leading organization if necessary) try now to estimate the costs.

They can report directly the estimated costs in an **annual budget plan**. We made an example of such a plan ([annex I.3.3](#)).

- If the LIS manager and the LIS assistant estimate all the costs during their meeting. The table is validated by the LIS manager and the task is over.
- If some Research and contact with suppliers or services providers are necessities, to estimate some costs, two options are possible:
  - Scenario 1: The LIS assistant (or some other person in the organization) will contact some of the following local actors(Property agencies, Suppliers of Office furniture and supplies, Human resource service of the leading organization (to identify the human resources costs), IT services firms, IT suppliers firms, ...), to fill in the gaps in the assessment table. For each category, different actors can be contacted, in order to have different sources for each budgetary line. The contact can be made: (1) by phone preferably, (2) by email, (3) or by an appointment.
  - Scenario 2: A specialized consultant is hired, in order to estimate the costs. This solution will be more expensive. The consultant leads a survey and reports the results to the LIS manager.

---

## HUMAN RESOURCES

Human resources necessary to carry out task I.3.3.2 are estimated to the equivalent of 2 staff/days

The responsible for task I.3.3.2 should be the LIS manager. He should be assisted by the LIS assistant or by the consultant (and, if necessary, by other people of the leading organisation).

---

## FINANCIAL RESOURCES

-Human resource cost of 2 staff/days (scenario 1) or consultation cost (scenario 2)

---

## EXPECTED OUTPUT

The expected output of task I.3.3.2 is the **annual budget plan (annex I.3.3)**

---

## VALIDATION PROCESS

Task I.3.3.2. is expected to be validated by the LIS manager at the local level (or anyone else competent in the leading organization)

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<b>TASK CODE:</b>	<b>I.3.3.3.</b>	<b><i>Preparation of the stakeholders' assembly</i></b>
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<b>ACTION CODE:</b>	<b>I.3.3.</b>	ANNUAL BUDGET PROCEDURES
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## OBJECTIVE

The objective of task I.3.3.3 is to approximate the costs of each line previously inventoried.

---

## METHODOLOGY

The leading organization should use the following process, to prepare the assembly: (But another process can be used if it is relevant).

1. One month before the assembly, a registered invitation letter is sent to each organization involved. The **annual budget plan (annex I.3.3)** will be enclosed to the invitation. The **stakeholders matrix**, output of task I.1.2.2 will be used as an input, to build the [Annual Budget meeting matrix \(annex I.3.3 bis\)](#). The **stakeholders' matrix** includes, for each organization, the name of a responsible, legally authorized to represent the organization. The letter will be sent to this person. Those people will have to answer to the invitation before a deadline (e.g. two weeks). Each organization potentially involved should be present at the meeting. If some organization doesn't answer in times, the LIS assistant will call them by phone. If a person contacted can't come, he has to be replaced by someone else in his organization.
2. Each answer will be reported in the "**Annual Budget meeting matrix**".
3. The LIS assistant will reserve a room, spacious enough for all the participants (their number may be a lot higher than the board's of stakeholder one), and the necessities supplies to present the meeting (microphone, screen to project the PowerPoint presentation if necessary...) will be prepared.
4. The LIS manager will also have to prepare the intervention he will present during the meeting (presentation of the **annual budget plan**).

---

## HUMAN RESOURCES

Human resources necessary to carry out task I.3.3.3 are estimated to the equivalent of 0.5 staff/week

The responsible for task I.3.3.3 should be the LIS assistant (or anyone else competent in the leading organization)

---

## FINANCIAL RESOURCES

Human resource cost of 0.5 staff/week

---

## EXPECTED OUTPUT

The expected output of task I.3.3.3 is the **Annual Budget meeting matrix (annex I.3.3 bis)**, where all the participants are reported.

---

## VALIDATION PROCESS

Task I.3.3.3. is expected to be validated by the LIS manager at the local level (or anyone else competent in the leading organization)

**TASK CODE: I.3.3.4.**

***Submission to the stakeholders' assembly vote***

**ACTION CODE: I.3.3.**

ANNUAL BUDGET PROCEDURES

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## OBJECTIVE

The objective of task I.3.3.4 is to validate the annual budget plan.

---

## METHODOLOGY

1. The **annual budget plan (annex I.3.3)** is quickly presented by the LIS manager (or anyone else competent in the leading organization)
2. A vote is organized, in order to validate it.
  - If the majority agrees, the plan is validated.
  - If the stakeholders invalidate the document, some changes will be brought to it. Once the changes have been taken into account, the assembly of stakeholders will have to validate the document again: the process is back to I.3.3.1. : Another meeting has to be organized, in order to validate the financial plan...

---

## HUMAN RESOURCES

Human resources necessary to carry out task I.3.3.4 are estimated to the equivalent of 1 staff/day

The responsible for task I.3.3.4 should be the LIS manager, the LIS assistant, and, if necessary, by other people of the leading organisation.

---

## FINANCIAL RESOURCES

Human resource cost of 1 staff/day

---

## EXPECTED OUTPUT

The expected output of task I.3.3.4 is the validated **annual budget plan (annex I.3.3)**

---

## VALIDATION PROCESS

Task I.3.3.4. is expected to be validated by the LIS manager at the local level (or anyone else competent in the leading organization)

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**ACTION CODE:**

**I.3.4.**

**ACCESS RIGHT MANAGEMENT PROCEDURES**

**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of action I.3.4, is to clearly define the different type of access right, and the way to manage them.

## TASK DIAGRAM

**I.3.4.**

Definition of Access rights  
types  
**I.3.4.1**



Attribution and deletion of  
access rights  
**I.3.4.2**

<b>TASK CODE:</b>	<b>I.3.4.1.</b>	<b><i>Definition of access rights types</i></b>
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<b>ACTION CODE:</b>	<b>I.3.4.</b>	ACCESS RIGHT MANAGEMENT PROCEDURES
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#### OBJECTIVE

The objective of task I.3.4.1. is to define the different access rights type, i.e. the set of right that will be attributed to the different groups of stakeholders.

---



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## METHODOLOGY

### 1. At least two different user's types have to be defined:

#### ▪ User's:

- i. What kind of rights? The user's role is to share information, using the system. To meet this goal, they will have the following rights (adaptable, to match a LIS specificities):

##### **Searching information**

- Define geographic criteria of search by typing a geographical location
- Define geographic criteria of search by selecting a location in a geographical thesaurus
- Define geographic criteria of search either by delimiting an area on an interactive map
- Define thematic criteria of search by typing free keywords
- Define thematic criteria of search by selecting keywords in a thematic thesaurus
- Consult the definition of a specific term via an interactive glossary
- Find out the LIS data repository which data sources are matching the selected criteria
- Select a data source in a list of items matching the selected criteria and view its related metadata
- If available, download the data
- If available, view the data itself with an appropriate viewer (Word, Excel, etc.)

##### **Uploading information**

- Edit and save new metadata records
- Attach to the record a set of keywords from a thesaurus
- Attach to the record a data file
- Define the access rights to download or view such a data file

##### **Participating to Fora**

- Access one or several fora related to coastal zone management
- Read previous messages posted to a specific forum
- Post new message to a specific forum

- ii. Who? It concerns the different stakeholders who haven't the administrators rights

#### ▪ Administrators:

- i. What kind of rights? The administrators have to manage the system. To meet this goal, they will have the following rights:

1. **The entire user's rights:** search, download, and upload information, access, read, and write messages on forums.
2. **Specific management rights:**
  - Select the language for the criteria of search, the interface, and the glossary
  - Modify or delete existing metadata records
  - Create or delete a new forum
  - Create, modify, delete user profiles with specific access rights (rights to search for data, to view or download data themselves, to upload new information, to participate a forum)
  - Create, modify, delete new users within each user profile
  - Regular transfer of metadata, and if available data themselves, towards EUROSION server.

- ii. Who? Only a few people in the leading administration should have this right. We advice that they should only be attributed to the LS manager and another person (it could be the LIS assistant).

*The attribution of rights has to be adapted to each specific LIS (It depends on the chosen functionalities...)*

### 2. It's possible and can be useful to distinguish several kind of user's types:

For example, a first kind of users: user 1 could have all the users rights, and a second kind of users, user 2, could search and download information and participate to forums, but couldn't upload any information (or could search and download information but couldn't upload any information and participate to forums...).

---

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## HUMAN RESOURCES

Human resources necessary to identify the different user's types is estimated to the equivalent of 2 staff/ days.  
The responsible of task I.3.4.1. should be the LIS manager.

---

## FINANCIAL RESOURCES

Human resource cost of 2 staff/ days

---

## EXPECTED OUTPUT

The main output from task I.3.4.1. is the **list of user's profile**

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## VALIDATION PROCESS

The **list of user's profile** will be validated by **the LIS manager** (or anyone else competent in the leading organization)

---

**TASK CODE:** I.3.4.2.

## ***Attribution and deletion of rights***

**ACTION CODE:** I.3.4.

ACCESS RIGHT MANAGEMENT PROCEDURES

### **OBJECTIVE**

The objective of task I.3.4.2 is to take into account the new subscriptions and resignations in terms of access rights.

### **METHODOLOGY**

One of the administrators will be responsible for the updating of access rights.

1. All the users and their profiles are stored in a table (for example Excel)
2. After each new subscription, the new user profile (including his access rights) is created in a maximum delay of three days.
3. After each confirmation of resignation, the user profile (including his access rights) is deleted in a maximum delay of three days.
4. In some specific cases, some users' access right types can be changed. It has to be agreed by the LIS manager.

### **HUMAN RESOURCES**

The responsible for this task should always be the same person (the LIS manager or another identified administrator). The human resources necessary to update the access rights is estimated to the equivalent of 3 staff days at the beginning of the LIS and 1 staff days per month during the operating period.

### **FINANCIAL RESOURCES**

Human resource cost of 3 staff days at the beginning of the LIS and staff days per month during the operating period

### **EXPECTED OUTPUT**

The expected output of task I.3.4.2 is the updating of access rights.

### **VALIDATION PROCESS**

Each modification of the table of access rights will be validated by the LIS manager (or anyone else competent in the leading organization)

**ACTION CODE:**

**I.3.5.**

**FORUM MANAGEMENT PROCEDURES**

**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of action I.3.5, is to manage efficiently the forums that have been created, i.e. to ensure that stakeholders participation is sufficient and to allow an efficient use of those forums.

## TASK DIAGRAM

### **I.3.5.**

Promoting stakeholders'  
participation  
**I.3.5.1**

Creation/Deletion of forums  
**I.3.5.2**

Forum content management  
**I.3.5.3**

<b>TASK CODE:</b>	<b>I.3.5.1.</b>	<b><i>Promotion of stakeholders' participation</i></b>
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<b>ACTION CODE:</b>	<b>I.3.5.</b>	FORUM MANAGEMENT PROCEDURES
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### OBJECTIVE

One of the strongest difficulties, in an online forum management, is to find a way to promote stakeholders' participation, i.e. to ensure that people share ideas and information on it. To reach this goal, it is important to spur regularly their participation.

---

### METHODOLOGY

- New LIS subscribers training encompass a "Participation to forums" part. During this session, the trainer should insist on the utility of the forum and encourage people to use it.
- Someone of the leading organization should have the responsibility to encourage regularly people to participate to forums, and to explain them once again the utility and pertinence of a forum as a sharing information tool. This can be done by phone or by email. A special effort has to be made after the first opening of the forum. People will be more incited to post messages in a forum which already includes a lot of messages.
- A newsletter can be implemented (please see task I.2.5), to diffuse updated information about the LIS. This newsletter should have a part dedicated to forums.
- The link of the LIS site toward the forum should be very visual and attractive.
- The utilisation of the forum should be clearly explained in the users' handbook, but also online.
- Others relevant measures can be undertaken

---

### HUMAN RESOURCES

Human resources necessary to spur the stakeholders' participation to forums is estimated to the equivalent of 4 staff/ days the first month and 2 staff/days per month during the operation of the LIS.  
The responsible should be the LIS manager, or another person of the leading organization.

---

### FINANCIAL RESOURCES

Human resource cost of 4 staff/ days the first month and 2 staff/days per month during the operation of the LIS.

---

### EXPECTED OUTPUT

The main output from task I.3.5.1 is the number of users of a forum. (or the number of messages posted). A minimum can be fixed (e.g.: 30 messages/ month).

---

### VALIDATION PROCESS

The LIS manager (or anyone else competent in the leading organization) ensures that the expected output matches the objective.

---

**TASK CODE:** I.3.5.2.

## ***Creation/ deletion of new forums***

**ACTION CODE:** I.3.5.

FORUM MANAGEMENT PROCEDURES

### **OBJECTIVE**

The objective of task I.3.5.2 is to update regularly the different forum, according to the stakeholders' needs.

### **METHODOLOGY**

- Creation of a new forum.
  - Each forum deals with a specific issue. At the opening of the LIS, a few forums have to be created, on various local coastal management issues (e.g.: information issues, Public Perception and Stakeholder Communication issues, Socio Economical issues, technical issues, policy issues, physical issues)
  - During the operation of the LIS, the leading institution can create new forums when she thinks it's pertinent or when stakeholders ask them (by email, mail, phone or appointment) to create one.
- Deletion of forums: After a certain period of time that as to be defined (e.g. 1 month), the LIS manager, or another person of the leading institution can delete the unused forum.

(Option: Forums containing useful information can be transformed into FAQ, or other reference documents. The most needed and important information would thus be quickly and easily accessible.)

### **HUMAN RESOURCES**

Human resources necessary to manage the creation/ deletion of forums is estimated to the equivalent of 0.5 staff day per month.

### **FINANCIAL RESOURCES**

Human resource cost of 0.5 staff day per month.

### **EXPECTED OUTPUT**

The expected output of this task is the regular updating of forums, which have to match stakeholders' needs.

### **VALIDATION PROCESS**

Each creation or deletion of forum has to be validated by the LIS manager (or anyone else competent in the leading organization)

<b>TASK CODE:</b>	<b>I.3.5.3.</b>	<b><i>Forums content management</i></b>
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<b>ACTION CODE:</b>	<b>I.3.5.</b>	FORUM MANAGEMENT PROCEDURES
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### OBJECTIVE

The objective of task I.3.5.3. is to ensure that the content of the forums is fair and matches the goal of such a forum, i.e. sharing constructive information and ideas about coastal management. The forum shouldn't contain slanderous posts, posts with racist or sexist messages, or posts which do not concern coastal management at all.

### METHODOLOGY

There are 2 main possibilities, to manage the content of forums:

(i) **Strong moderation:** A moderator controls the forums. He may edit, delete or prune any posts in the forums. He is also responsible for answering the various stakeholders' questions about the forums.

-The moderator approves, or deletes a user post before it is shown to public.

-Before the moderator decision, the post is put on hold, i.e. it is waiting for the moderator approbation or deletion, and, during this period, not viewable to the public.

-When the post is approved, it becomes viewable to the public.

-If the post is deleted, an email is sent to the poster of the message, explaining him the reasons for the deletion.

Two options can be examined:

-One general moderator for all forums

-One moderator per forum (If too many forums are implemented, some voluntary stakeholders can become forums moderators)

This method provides a good security but may entails a lack of flexibility and dynamism in the use of forums.

(ii) **Light moderation:** Each message doesn't have to be approved by the moderator. He just checks regularly that they respect the aim of such forums, and, if needed, delete punctually a particular message. We would rather advice this method.

### HUMAN RESOURCES

Human resources necessary to moderate the forums depends on the chosen method, the size of the forum and its use frequency. An estimation of the human resource necessary to moderate the forum could be 2 staff days per month.

-The moderator can be the LIS manager or another person of the leading organization

### FINANCIAL RESOURCES

Human resource cost of 2 staff days per month.

### EXPECTED OUTPUT

The expected output of this task is the good operation of the forums.

### VALIDATION PROCESS

The LIS manager (or anyone else competent in the leading organization) should regularly check the forums content.

**ACTION CODE:**

**I.3.6.**

**DATA QUALITY CONTROL PROCEDURE**

**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of the action I.3.6, **Data quality control procedure**, is to propose a set of procedures that will enable the metadata and data of the LIS to keep a good standard of quality.

## TASK DIAGRAM

**I.3.6.**

Stakeholders' institutions data  
quality responsible  
**I.3.6.1**

Leading institution quality  
responsible  
**I.3.6.2**



<b>TASK CODE:</b>	<b>I.3.6.1.</b>	<b><i>The leading institution quality responsible</i></b>
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<b>ACTION CODE:</b>	<b>I.3.6.</b>
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DATA QUALITY CONTROL PROCEDURES
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## OBJECTIVE

The objective of task 1.3.6.1 is to determine the way the leading institution will centralize the quality control process.

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## METHODOLOGY

- A “data quality responsible” is chosen in the leading institution, before the opening of the LIS.
- We advice the “data quality responsible” to be the LIS manager. But it can be someone else in the leading institution.
- The data quality responsible in the leading institution has to check that the metadata and data furnished by the different institutions have a good standard of quality. He checks regularly the metadata and data uploaded by the different institutions
- He centralizes the eventual complaints from the stakeholders concerning the quality of data and metadata.
- When a complaint is made, he asks the quality responsible of the concerned institution to check and eventually correct the irregularity.
- If five complaints have been made about an institution in a year, a special stakeholders meeting take place: a vote is organized in order to decide if the concerned institution is going to be dismissed from the LIS.

---

## HUMAN RESOURCES

Human resources necessary to monitor the data quality of the LIS is estimated to the equivalent of 3 days/ month.

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## FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of 3 days/ month.

---

## EXPECTED OUTPUT

The main output from task I.3.6.1 is a good standard of quality of the information circulating into the LIS (It can be measured by the number of complaints about data quality per year, for example)

---

## VALIDATION PROCESS

The LIS manager (or anyone else competent in the leading organization) validates the complaints and the eventual minutes of the meetings.

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<b>TASK CODE:</b>	<b>I.3.6.2.</b>	<b><i>Partners data quality responsible</i></b>
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<b>ACTION CODE:</b>	<b>I.3.6.</b>	<b>DATA QUALITY CONTROL PROCEDURES</b>
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## OBJECTIVE

The objective of task I.3.6.2 is to give the responsibility of the quality of information provided by each stakeholder to one person per partner institution.

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## METHODOLOGY

- After the subscription of a new partner, the LIS manager determine who will be the “data quality responsible” of this institution, in a maximum delay of 2 weeks.
- We advice the “data quality responsible” to be the LIS responsible in the institution. But it can be someone else in the institution.
- The data quality responsible has to check that the metadata and data furnished by his institution has a good standard of quality, according to its criteria of quality. The information provided should be regularly updated and fair.
- He a complaint has been made by another institution about the quality of data of a partner, the LIS manager will ask him to check the quality of this information and to correct the eventual irregularity.

---

## HUMAN RESOURCES

Human resources necessary to monitor the data quality of one partner institution is estimated to the equivalent of 1 staff day/ month

The LIS manager is responsible of the determination of each partner “data quality responsible”. The data quality responsible is responsible for controlling the information provided by his institution.

---

## FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of 1 staff day per month for the partners institution

---

## EXPECTED OUTPUT

The main output from task I.3.6.1 is a good standard of quality of the information circulating into the LIS (It can be measured by the number of complaints about data quality per year, for example)

---

## VALIDATION PROCESS

The LIS manager(or anyone else competent in the leading organization) validates the choice of the data quality responsible of each institution

**ACTION CODE:**

**I.3.7.**

**NEW USERS TRAINING PROCEDURES**

**STEP CODE:** I.3.

MANAGEMENT AND MAINTENANCE

## OBJECTIVE

The objective of action I.3.7, **New user's training procedures**, is to ensure that the new users of the LIS are able to use it efficiently. The training will be equivalent to the "users module" described on task I.2.4.

## TASK DIAGRAM

**I.3.7.**

Preparation of the training  
**I.3.7.1**



Training session  
**I.3.7.1**

**TASK CODE:** I.3.7.1

## ***Preparation of the training***

**ACTION CODE:** I.3.7.

NEW USERS TRAINING PROCEDURES

### **OBJECTIVE**

The objective of task I.3.7.1. **Preparation of the training** is to ensure that all the logistics needs are taken into account. The methodology is almost the same as for task I.2.4.1.

### **METHODOLOGY**

The following process should be used, to prepare the training: (But another one can be used if it is relevant).

1. For each new subscription, the number of people interested by the training and their technical capacities are taken into account. (Number of sessions, content of sessions...).
2. Training sessions are organized, on the basis of that information. Two options should be taken into account:
  - a. The training can be led by the LIS manager or someone in the leading organization
  - b. The training can be led by the IT firm, in charge of the maintenance and the technical support.

We advice the training to be done by a responsible of the leading organization, who is now familiar with the utilisation of the LIS. It is less expensive than training by the IT firm. Moreover it allows the leading organization and the new stakeholder to get to know each other better.

3. A date is fixed, for the training session, with the new user
4. The leading organization responsible should reserve the room at least two weeks before the training. The training can take place in the IT firm, in the leading institution, or in the new subscribing institution. The amount of person to be trained will be less important than during the LIS launching training.

### **HUMAN RESOURCES**

Human resources necessary to prepare the training session is estimated to the equivalent of 1 staff-day. The responsible for task I.3.7.1 should be someone in the leading organization, or the IT developer.

### **FINANCIAL RESOURCES**

Human resource cost of 1 staff day

### **EXPECTED OUTPUT**

The main output from task I.3.7.1. is the list of participants for the training session

### **VALIDATION PROCESS**

Task I.3.7.1. is expected to be validated by the LIS manager at the local level, or anyone else competent in the leading organization (He signs the list of participants).

<b>TASK CODE:</b>	<b>I.3.7.2</b>	<b><i>Training session</i></b>
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<b>ACTION CODE:</b>	<b>I.3.7.</b>	NEW USERS TRAINING PROCEDURES
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## OBJECTIVE

The objective of the task I.3.7.2. is to empower the competences of the futures users of the LIS, in order to ensure that they will be able to use efficiently the LIS (i.e. uploading, searching and downloading information, using the forums...). The content of the session is the same as the one detailed on task I.2.4.

## METHODOLOGY

Each user has to try to execute himself each task that will be presented to him during the training session. The training is concrete. After a brief presentation of the tools and of the planning of the module, all the training is led as a practical work with the Internet based tool. The trainer must ensure that the training is interactive, and that each user participates. The module is divided into two parts:

### 1. Part 1: Uploading information (3-4 hours)

- a. Edit and save metadata new records.
- b. Attach to the record :
  - a set of keywords from the thesaurus,
  - information about the temporal coverage,
  - the spatial coverage,
  - the use constraints....
- c. Attach to the record a data file,
- d. Define the access rights to download or view such a data file.

### 2. Part 2: Downloading information and participation to forums (3-4 hours)

- a. Downloading information
  - Use the search engine to find the data you have downloaded, using: the temporal feature, the spatial feature (by typing a location and by selecting a location from the list and by delimiting the area on the map), the keywords (by typing it, and by selecting it from the list)...
  - Select your data
  - View it with an appropriate viewer (Word, Excel, etc.)
  - Download it
- b. Participation to forums
  - Post a message to the forum created
  - Read it

-Option: At the end of each part, a small test could allow to ensure that people are ready to use the LIS (testing the ability of people to use each function of the LIS). A third part could be organized for people who didn't do the test successfully.

-The content of the lessons can be adapted to the specificities of LIS functionalities.

-It can also be adapted on users technical capacities (see result of the LIS survey). If people have high technical capacities, the training can be shorter than 3 or 4 hours per session. If they have low technical capacity, the training can be longer.

## HUMAN RESOURCES

Human resources necessary to prepare the training session is estimated to the equivalent of 0.5 staff-day.

The responsible for task I.3.7.2 should be someone in the leading organization, or the IT developer.

## FINANCIAL RESOURCES

Human resource cost of 0.5 staff days.

---

## EXPECTED OUTPUT

The main output from task I.3.7.2. are:

- The "presence paper", where each user sign at the beginning of each part of sessions.
- A LIS certificate (optional), proving that the user have been trained and is able to use the LIS.

---

## VALIDATION PROCESS

Task I.3.7.2. is expected to be validated by the LIS manager at the local level (He signs each LIS certificate and the completed presence paper).

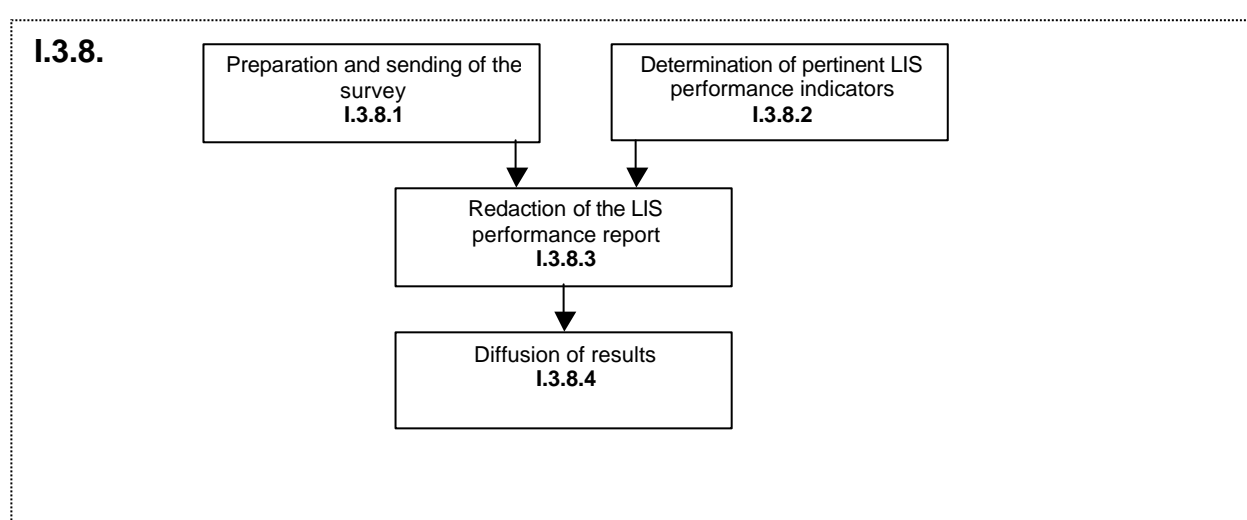
<b>ACTION CODE:</b>	<b>I.3.8.</b>	<b>DOCUMENTATION PROCEDURES</b>
---------------------	---------------	---------------------------------

<b>STEP CODE:</b>	<b>I.3.</b>	<b>MANAGEMENT AND MAINTENANCE</b>
-------------------	-------------	-----------------------------------

## OBJECTIVE

The objective of the action I.3.8, **Documentation procedures**, is to give an overview of the process that will document the performance of the LIS. A survey will be led and performance indicators will be measured and collected. Those elements will be synthesized in a LIS performance report, which will be diffused to each stakeholder.

## TASK DIAGRAM



<b>TASK CODE:</b>	<b>I.3.8.1.</b>	<b><i>Preparation and sending of the users satisfaction survey</i></b>
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<b>ACTION CODE:</b>	<b>I.3.8.</b>	DOCUMENTATION PROCEDURES
---------------------	---------------	--------------------------

## OBJECTIVE

The objective of the task I.3.8.1 is to (1) define the content of the user satisfaction survey and (2) lead it (each year).

## METHODOLOGY

1. The LIS manager, the LIS assistant, and, if necessary, other people of the leading organization meet and discuss the users satisfaction survey content. [Annex I.3.8.1](#) illustrates an example of what could be a user satisfaction survey. If the survey is mandatory, its content is optional and can be adapted to a particular LIS specificity. In any cases, the survey objective is to check if the LIS reaches its goals. We advice the leading organization to create a quite short survey. The content of the survey should be defined on first survey. It's not necessary to re-define it for next surveys, unless the LIS has evolved.
2. Each year (or at a higher frequency, if the leading organization thinks it is useful), the survey will be led. All the subscribing organizations have to participate. The survey is sent to a responsible of each stakeholder organization.
  - a. The survey can be sent by email to the different responsible. A deadline has to be fixed (e.g.: one week after the sending of the survey). A phone call to the person allows ensuring that he/she has taken into account the deadline.
  - b. An appointment can be made, where the investigator visit the stakeholder and guide him while he answers the questions, or where the investigator start a conversation with him, where all subjects of the survey are discussed.
  - c. All the survey can be lead by phone

## HUMAN RESOURCES

Human resources necessary to lead the survey is estimated to the equivalent of 1 staff/week (1 more staff/day should be added the first time for the definition of the survey).

## FINANCIAL RESOURCES

Human resource cost of 1 staff/week (1 more staff/day should be added the first time for the definition of the survey).

## EXPECTED OUTPUT

The main output from task I.3.8.1 is the result of the survey.

## VALIDATION PROCESS

The survey results are validated by the LIS manager at the local level (or anyone else competent in the leading organization).



<b>TASK CODE:</b>	<b>I.3.8.2.</b>	<b><i>Determination of pertinent LIS performance indicators</i></b>
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<b>ACTION CODE:</b>	<b>I.3.8.</b>	MANAGEMENT AND MAINTENANCE
---------------------	---------------	----------------------------

---

## OBJECTIVE

The objective of task I.3.8.2 is to determine a set of indicators, in order to measure the quality of the LIS working.

---

## METHODOLOGY

A first proposal of indicators has been inventoried:

- Number of organization subscribing to the LIS (by type of organization and by level of responsibility) (currently and per year)
- Number of Sites Visits (per month and per year)
- Number of documents downloaded, by subject (per month and per year)
- Number of documents uploaded, by subject (per month and per year)
- Number of messages posted on forums (per month and per year)
- Stakeholders' satisfaction indices (results of the survey led during task I.3.8.1)

This list isn't mandatory and can be adapted to the LIS specificities.

The LIS manager, the LIS assistant, and, if necessary, other persons in the leading organization organize an internal meeting and discuss the LIS performances indicators. The list of indicators should be defined on first survey. It's not necessary to re-define it for next surveys, unless the LIS has evolved.

---

## HUMAN RESOURCES

Human resources necessary to determine the set of indicators are estimated to the equivalent of 1 staff/day

---

## FINANCIAL RESOURCES

Human resource cost is estimated to the equivalent of 1 staff/day

---

## EXPECTED OUTPUT

The expected output of task I.3.8.2 is the list of pertinent indicators

---

## VALIDATION PROCESS

The list of indicators is validated by the LIS manager at the local level (or anyone else competent in the leading organization).

---

<b>TASK CODE:</b>	<b>I.3.8.3.</b>	<b><i>Redaction of the LIS performance report</i></b>
-------------------	-----------------	---

<b>ACTION CODE:</b>	<b>I.3.8.</b>	MANAGEMENT AND MAINTENANCE
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---

### OBJECTIVE

The objective of task I.3.8.3 is to synthesize the results of tasks I.3.8.1 and I.3.8.2 in a [LIS performance report \(Annex I.3.8.3\)](#).

---

### METHODOLOGY

1. The performance indicators will be automatically calculated by the system. The LIS assistant report them in the LIS performance report (**Annex I.3.8.3**)
2. The results of the user satisfaction survey are also reported in the LIS performance report.
3. After each indicator, a few line of analysis is written, trying to explain the figures and their variations.

---

### HUMAN RESOURCES

Human resources necessary to carry out the collection survey are estimated to the equivalent of 1 staff/day  
The responsible of task I.3.8.3 should be the LIS assistant (or anyone else competent in the leading organization).

---

### FINANCIAL RESOURCES

Human resource cost of 1 staff/day

---

### EXPECTED OUTPUT

The expected output of task I.3.8.3 is the **LIS performance report (Annex I.3.8.3)**

---

### VALIDATION PROCESS

The leading organization should use the following validation process: (But another process can be used if it is relevant).

1. The investigator will send by email the output of the task to the LIS manager.
2. Then he will take an appointment with him, to explain him directly the result oh his work. The LIS manager will:
  - a. validate the document (in this case, the task is over)
  - b. or ask the investigator to bring a few corrections if needed. In this case, the investigator will bring the changes, and the process backs to 1: he sends an email, take an appointment...).

**TASK CODE:****I.3.8.4.*****Diffusion of the LIS performance report*****ACTION CODE:****I.2.5.**

MANAGEMENT AND MAINTENANCE

**OBJECTIVE**

The objective of task I.3.8.4. is to diffuse the report to the stakeholders.

**METHODOLOGY**

The report can be diffused by different means. When the report is sent, it should be written that any comments from the stakeholders would be welcomed.

- Email to each stakeholder
- Mail
- The report can be available online
- It can be presented during a stakeholder meeting
- The main analysis can be reported in the newsletter, if the leading organization has chosen to diffuse newsletters

**HUMAN RESOURCES**

Human resources necessary to carry out the collection survey are estimated to the equivalent of 0.5 staff/days  
The responsible of task I.3.8.4. should be the LIS assistant.

**FINANCIAL RESOURCES**

Human resource cost of 0.5 staff/days

**EXPECTED OUTPUT**

The report should be available for the stakeholders.

**VALIDATION PROCESS**

Task I.3.8.4. is expected to be validated by the LIS manager at the local level

---

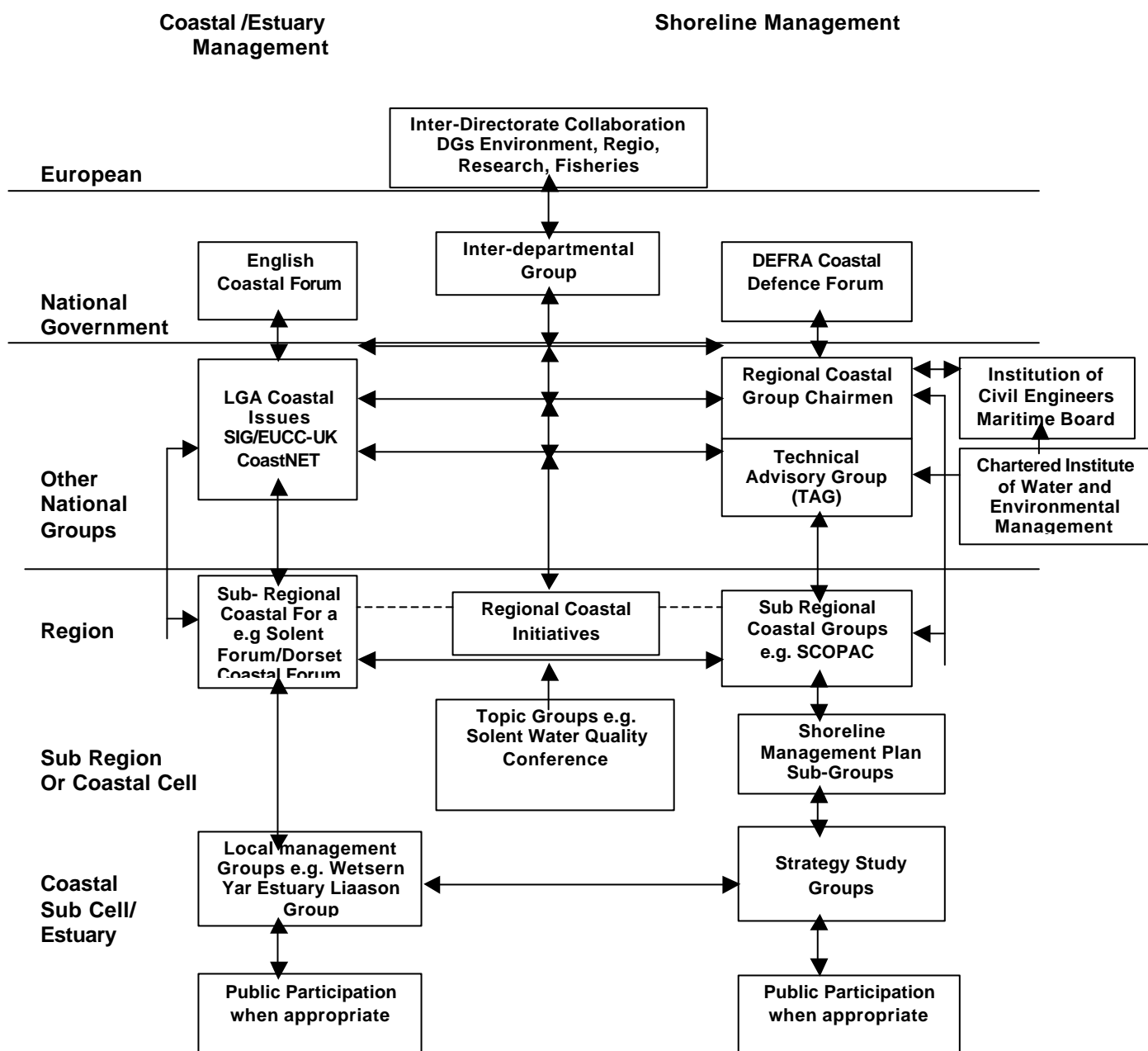
## **ANNEXES**

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## ANNEX I.1.1: Competence Matrix

[illegible]

## ANNEX I.1.2.2: Example of an information flux diagram: the case of the Isle of Wight



## ANNEX I.1.2.6: LIS Feasibility and pre-design survey

To

Date

Enclosure(s)

Our reference

Your reference

Subject

EUROSION – Local Information System feasibility and pre-design survey

Dear Madam, dear Sir,

We [the leading institution] currently assess the feasibility of implementing a local information system (LIS) in our region/ city/ county. This system would be dedicated to: (i) exchange of digital information on shoreline management – including documents, datasets, maps, pictures on digital format – between institutions, and (ii) promote public participation to shoreline management activities including execution of feasibility studies, environmental impact assessment prior to coastal developments, or coastline monitoring.

We understand that your institution is potentially involved in the sharing of information about shoreline management. We therefore request your contribution and support to our feasibility and pre-design survey. We kindly request you to fill out the attached survey form - which aims at collecting specific information about: the definition of responsibilities in the coastal management of the region/ city/ county, the decision making process, the availability of existing information, the information quality and gaps and the technical capacities and the functional requirements you would expect from the LIS to improve coastal information management - and return before dd/mm/yyyy. Filling the questionnaire should take around half an hour.

# ***LIS FEASIBILITY AND PRE-DESIGN SURVEY***

Last name: .....

First name: .....

Position: .....

Organisation: .....

Telephone: .....

Fax: .....

Email: .....

**The filled out form should be returned to:**

The leading institution responsible .....

.....

.....

.....

.....

---

## **1. Definition of responsibilities**

- a. Could you define in 10 lines maximum the responsibility of your organisation with respect to coastline management?

.....  
.....  
.....  
.....  
.....  
.....  
.....  
.....  
.....  
.....

- b. Is there some overlapping of responsibilities between your organisation and other organisation?

☐ Yes      ☐ No

- c. If yes, with which organisation?

.....

- d. and on which aspects ?

.....  
.....  
.....  
.....  
.....



- e. Do you have a clear understanding of the responsibilities of the other organisations involved in coastline management?

☐ Yes ☐ No

- f. If no, where are the uncertainties?

.....

.....

.....

.....

.....

- g. Is there any arbitration procedure to solve potential conflicts of responsibilities?

☐ Yes ☐ No

- h. If yes, could you describe such procedures?

.....

.....

.....

.....

.....

- i. According to you, is there a good coordination between the different level (international, national, regional, local)?

☐ Yes ☐ No

- j. If no, what are the gaps?

.....

.....

.....

.....

.....

- k. According to you, is there a good communication, between the different kind of stakeholders (Local Government, Government Agencies, NGOs and the public..)?

☐ Yes ☐ No

- l. If no, what are the gaps?

.....

.....

.....

.....

.....

- m. What can be done, according to you, to improve the definition of responsibilities relating to coastline management?

.....  
.....  
.....  
.....

## 2. *Decision making process*

- a. Are you involved in the decision-making process relating to coastline management as:

- a policy-maker?

☐ Yes      ☐ No

- an operational body (policy implementation) ?

☐ Yes      ☐ No

- an arbitration body ?

☐ Yes      ☐ No

- an advisory/consultative body?

☐ Yes      ☐ No

- other (to be specified)?

.....

- b. Would you define the decision making process relating to coastline management in your area as efficient?

☐ Yes      ☐ No

- c. If no, why?

.....  
.....  
.....  
.....  
.....

- d. Is the public involved in the decision making process?

☐ Yes      ☐ No

- e. If yes, how is it involved?

.....  
.....  
.....

.....  
.....  
.....

f. Is an environmental evaluation required, before starting a particular project?

☐ Yes      ☐ No

g. If yes, for which kind of projects?

.....  
.....  
.....

h. Are the decisions made fair, impartial, and transparent?

☐ Yes      ☐ No

i. According to you, how could the decision-making process be improved?

.....  
.....  
.....  
.....  
.....

**3. Availability of existing information?**

a. Are you involved in information production?

☐ Yes      ☐ No

b. If yes, which type(s) of information

- on laws and policies?

☐ Yes      ☐ No

- on physical and ecological processes?

☐ Yes      ☐ No

- on technical and engineering solutions?

☐ Yes      ☐ No

- on socio-economy?

☐ Yes      ☐ No

- on social perception and communication between stakeholders?

☐ Yes      ☐ No

- on information management?

☐ Yes      ☐ No

c. Is your information available

- for free?

☐ Yes ☐ No

- for a restricted group of users?

☐ Yes ☐ No

- online?

☐ Yes ☐ No

d. Which percentage of your annual budget is approximately dedicated to information production?

.....

e. Would you define yourself as an information user?

☐ Yes ☐ No

f. If yes, which type(s) of information are you using?

- on policies?

☐ Yes ☐ No

- on physical and ecological processes?

☐ Yes ☐ No

- on technical solutions?

☐ Yes ☐ No

- on socio-economy?

☐ Yes ☐ No

- on social perception?

☐ Yes ☐ No

- on information management ?

☐ Yes      ☐ No

g. Is the information you generally use available

- for free?

☐ Yes      ☐ No

- for a restricted group of users?

☐ Yes      ☐ No

- online?

☐ Yes      ☐ No

h. Is there any directory of existing sources of information on coastline management available?

☐ Yes      ☐ No

i. Do you experience troubles in accessing existing sources of information?

☐ Yes      ☐ No

j. If yes, the troubles experienced consist in:

- difficulty to find the right interlocutor at the level of the data provider?

☐ Yes      ☐ No

- a long delay before obtaining the information after you requested it?

☐ Yes      ☐ No

- format (paper, digital) not consistent with your expectations?

☐ Yes      ☐ No

- other (to be specified)?

.....  
.....

k. What can be done, according to you, to improve the information availability?

.....  
.....  
.....

.....  
.....

#### **4. Information quality and gaps**

- a. According to you, are the following aspects sufficiently covered with existing information at the local level?

- laws and policies?

☐ Yes      ☐ No

- physical and ecological processes?

☐ Yes      ☐ No

- technical and engineering solutions?

☐ Yes      ☐ No

- socio-economy?

☐ Yes      ☐ No

- social perception and communication between stakeholders?

☐ Yes      ☐ No

- information management?

☐ Yes      ☐ No

- b. If yes to one at least of the above mentioned questions, please briefly explain the missing information?

.....  
.....  
.....  
.....  
.....  
.....  
.....

- c. In case you are an information user, do you experience troubles in using existing sources of information?

☐ Yes      ☐ No

d. If yes, the troubles experienced consist in

- geographical gaps?

☐ Yes ☐ No

- outdated information?

☐ Yes ☐ No

- information (in the case of reports) not easy to digest or understand?

☐ Yes ☐ No

- the technical specifications (e.g. scale, accuracy) which do not match your expectation?

☐ Yes ☐ No

- other (to be specified)?

.....

e. If yes to one at least of the above mentioned questions, what can be done, according to you, to improve this situation?

.....  
.....  
.....  
.....  
.....

##### **5. Technical capacities and functional requirement to improve information management**

a. In your institution, how many people are involved in information management (including information production, processing, analysis, and dissemination)?

.....

b. How would you define their average level of knowledge in the following fields?

- use of internet-based technologies (email, search on the internet, etc.) ?

☐ poor ☐ moderate ☐ high

- use of standard office management tools (MS Word, MS Excel, MS Access)?

☐ poor ☐ moderate ☐ high

- use of advanced processing tools (GIS software, image processing, statistical analysis models, etc.)?

☐ poor ☐ moderate ☐ high

c. What would you expect from a Local Information System dedicated to coastline management in your region?

- a directory of institutions involved in coastline management at the local level?

☐ Yes ☐ No

- a directory of existing sources of information?

☐ Yes ☐ No

- a direct access to existing information in digital format?

☐ Yes ☐ No

-If yes, which information as a priority?

.....  
.....

- a calendar of major events relating to coasts and planned in the region or outside the region?

☐ Yes ☐ No

- a platform to exchange and facilitate the review of working documents or data ?

☐ Yes ☐ No

-If yes, such a platform be public or restricted to some specific stakeholders?

☐ public ☐ restricted

- an improved coordination between stakeholders through internet-based forums ?

☐ Yes ☐ No

-If yes, should such forums be public or restricted to some specific stakeholders?

☐ public ☐ restricted

**Thank you for answering the questions!**



## **ANNEX I.1.3 and ANNEX I.1.3bis: Existing information survey and List of key words**

For Annex I.1.3: Existing information survey, please see document “annexI13ExistInfo.xls”

### ***List of Keywords***

- Information Level
  - Evaluation
    - Trend
    - forecast
  - Analysis
  - Research
    - Field study
    - Research project
  - Education
    - training
  - Information
    - Information source
    - Public information
- Public Perception and Stakeholder Communication Level
- Socio Economical Level
  - Risks and Safety
    - Flood protection
    - Safety
    - risk
  - Impacts and Effects
    - Wetland loss
    - Habitat loss
    - Algal bloom
    - Eutrophication
    - Fish skill
    - Global warming
    - Env. impact of tourism
    - Env. impact of fishing
  - Recreation and Tourism
    - Tourism
    - Mass recreation
    - Local recreation
  - Traffic and transportation
    - Traffic on water
    - Road traffic
    - Transport
  - Urbanisation and Demography
    - Human settlements
    - Population density
    - Demography
    - Polder
    - Recreational area
    - Industrial area
    - Residential area
    - Coastal development
    - Urban development
    - Land use
  - Forestry
  - Industry
    - Mining

- Energy industry
- Fishery and Aquaculture
  - Fishery
- Agriculture
  - Grazing fields
  - Crops
- Resource utilisation
  - Sand extraction
  - Mineral extraction
  - Sea resource
- Technical Level
  - Monitoring
    - Bathymetric survey
    - Topographic survey
    - Aerial survey
    - Remote sensing
  - Coastal engineering
    - Soft engineering
    - Hard engineering
- Policy Level
  - policy
    - protected species
    - Environmental management
    - coastal policy options
  - Administration
    - Planning
    - management
  - legislation
    - Convention
    - Code of conduct
    - Treaty
    - Directive
    - law
  -
- Physical Level
  - morphodynamics
    - mud (sediment)
    - marine sediment
    - suspended matter
    - sediment transport
    - sedimentation
    - sediment
    - water erosion
    - Coastal erosion
    - Acute erosion
  - Coastal processes
    - hydrodynamics
  - Coastal area
    - seashore
    - salt marsh
    - mudflat
    - beach
    - Bay
    - Gulf
    - Cliff
    - estuary

- delta
  - river
- Water
  - Ocean
  - Surface water
  - sea
- Climate
  - Wind
  - Climate change

## ANNEX I.1.4: From generic to specific specifications

FUNCTIONS		
Function group No.1 : Searching information	Define geographic criteria of search by typing a geographical location	
	Define geographic criteria of search by selecting a location in a geographical thesaurus	Yes (mandatory)
	Define geographic criteria of search either by delimiting an area on an interactive map	
	Define thematic criteria of search by typing free keywords	
	Define thematic criteria of search by selecting keywords in a thematic thesaurus	Yes (mandatory)
	Consult the definition of a specific term via an interactive glossary	
	Find out the LIS data repository which data sources are matching the selected criteria	Yes (mandatory)
	Select a data source in a list of items matching the selected criteria and view its related metadata	Yes (mandatory)
	If available, download the data	
	If available, view the data itself with an appropriate viewer (Word, Excel, etc.)	
Function group No.2 : Uploading information	Edit and save new metadata records (1)	Yes (mandatory)
	Attach to the record a set of keywords from a thesaurus	Yes (mandatory)
	Define the access rights to download or view such a data file (optional)	
	Attach to the record a data file (optional)	
Function group No.3 : Participating to Fora	Access one or several fora related to coastal zone management	
	Post new message to a specific forum	
	Read previous messages posted to a specific forum	
Function group No.4 : Managing the system	Select the language for the criteria of search, the interface, and the glossary	
	Modify or delete existing metadata records	Yes (mandatory)
	Create or delete a new forum	
	Create, modify, delete user profiles with specific access rights	Yes (mandatory)
	Create, modify, delete new users within each user profile	Yes (mandatory)
	Regular transfer of metadata, and if available data themselves, towards EUROSION server.	Yes (mandatory)

(1) The different information types and metadata adopted will be documented here (annex I.1.3)

## CORPORATE DESIGN

	Generic features	Specific features (adaptation of generic features)
Number of frames		
Size of frames		
background colours		
text colours		
text font		
text size		
logos		
counters of visitors		

## EQUIPMENT REQUIRMENT

		Generic features	Specific features (adaptation of generic features)
hardware requirement	microprocessor		
	RAM		
	cache		
	hard disk		
	...		
software requirement	software 1		
	software 2		
	software 3		
	...		

## DOCUMENTATION

Users' handbook	
Generic features	Specific features (adaptation of generic features)

Manual of maintenance	
Generic features	Specific features (adaptation of generic features)

## ANNEX I.1.5: Assessment of implementation costs table

	Opérational costs		Investment costs	
Meeting with all stakeholders	Communication costs (Phoning, Registered letters, Internet)		—	
	Multiplication of documents		—	
	Coffe break		—	
	Human resources costs*		—	
Adaptation of EUROSION prototype to match the requirements of the feasibility and pre-design study	—		Informatic service cost (IT firm, or internal):development, redaction of documents (User Handbook, manual of Maintenance)	
Implementation	—		Informatic service cost (IT firm, or internal): implementation	
			Material: 1 server, 3 computers, 3 printers	
Tests	—		Informatic service cost (IT firm, or internal): tests	
Staff recruitment			Staff recruitment (communication and interviews cost)	
Staff Training			Training costs	
			Human resources costs*	
Marketing	Communication costs (Phoning, Registered letters, Internet)		—	
	Human resources costs*		—	
Maintenance and technical support	Maintenance		—	
	Technical support		—	
	Hosting		—	
	Opérational costs total	0	Investment costs total	0
<b>TOTAL</b>	0			

\*Advice: To take into account the cost of premise rent and office furniture and supplies, the cost of human resource (salary + charges) can be multiplied by 1.7

## ANNEX I.2.1: Memorandum of understanding

This Agreement is made the dd/mm/yyyy

BETWEEN

**The leading institution,  
Address .....**

AND

The partner institution

Address .....

---

### ➤ General objective of the Local Information System

The Information System is dedicated to: (i) exchange of digital information on shoreline management – including documents, datasets, maps, pictures on digital format – between institutions, and (ii) promote public participation to shoreline management activities including execution of feasibility studies, environmental impact assessment prior to coastal developments, or coastline monitoring.

### ➤ Definition

An information system can be defined as: “a set of technological, human, organisational, financial, and information resources organized in such a way to improve archiving, retrieval, representation, exchange and dissemination of information produced by institutions involved in shoreline management and on a specific area”.

### ➤ Components of the Local Information Systems

#### ○ The stakeholders

- The leading institution, which endorses the overall responsibility for implementing, promoting, administrating and maintaining the Information System. It can be either a regional, county, or municipality council, or the local representation of a national administration. In any case, the leading institution has an executive mandate and is accountable for its actions towards the public. Note that even in case the leading institution delegates the implementation and maintenance of the LIS to a third-party institution (e.g. an NGO or a private company), it still remains the responsible party.
- Data providers and users, i.e. institutions willing to share part of their information capital with other institutions, and as a counterpart, being granted an access to information from these other institutions.
- Internet-based service providers, i.e. companies which will customize the Internet-based tools – including run-time, scripts, XML models, etc - provided by EUROSION to the site-specific conditions

#### ○ The equipment

- Hardware and software, i.e. the set of interconnected computers and other devices (e.g. CD players, etc.) - together with their operating applications - which provide the technological infrastructure for archiving, retrieving, representing, exchanging and disseminating information. In the framework of EUROSION, it is assumed that such equipment are PC-based and standard, and that no excessive upgrade is required to use LIS
- An Internet based application, which customizes archiving, retrieval, representation, exchange and dissemination functionalities for the local stakeholders. These



functionalities are based on a thorough assessment of user needs and existing information at the local level and are adapted from EUROSION LIS prototype.

- The documentation
  - The technical specifications of the Internet-based application. These technical specifications are made of: (i) prototype specifications which describe the features which are common to the different LIS to be developed in the framework of EUROSION; and (ii) specific specifications which are customized for each different local area and are based on both the generic specifications and investigations carried out in each different site.
  - The user handbook
  - The manual of procedures for setting up and maintaining the LIS. This manual describes all the procedures relating to the LIS and ranging from the request of a data provider to join the LIS to the elaboration of annual reports and statistics.

Those few words of presentation can be changed by the LIS manager if necessary, in order to adapt them to the Local site specificities.

### ➤ General provision

- Agreement effective

This Agreement shall come into force immediately after it has been signed on behalf of both Parties by an authorised representative of each of them.

- Commencement and completion

The LIS services shall be commenced ..... and end .....

- Variations

The Agreement can be varied, by written agreement of the Contractor and the Sub-Contractor, on application by either of them.

### ➤ Partners' rights and duties :

- Partners' right

Each user of the LIS has the following rights:

- Access to information
  - **Each partner of the LIS is being granted an access to information from the other users. He will be able to search information according to different criteria (spatial and temporal coverage, theme...).**
- Access to forums
  - **Each partner of the LIS can access one or several forums related to coastal zone management.**
  - **Each partner of the LIS can read previous messages of the forums and post new messages.**
  - **Each partner can ask the leading institution to create a new forum.**
- Providing information
  - **Each partner of the LIS can share its information with others stakeholders. He can provide: metadata and, if available, data. When a partner provides a data, it can restrict the access to this data**
- Training
  - **Each new partner of the LIS can be trained to the use of the LIS.**
- Quitting the LIS

· **Each partner of the LIS can quit the LIS at every moment, on request to the leading organization.**

- Partners' duties

Each user of the LIS has the following duties:

- Sharing information
  - **Each partner has the duty to contribute to the implementation of a local metadata base, accessible by the public**
- Quality of information
  - **Each partner of the LIS has the duty to assume the quality of the information he provides, according to its own criteria. This information should be up-to-date and fair**
- Quality control
  - **Each partner accepts to answer the surveys about the quality of the LIS that partner regularly be led by the leading institution.**
- Meetings
  - **Each partner accepts to take part in the coordination meetings.**
- Fees
  - **Each partner accept to pay its annual fees (EU ...)**

If a partner doesn't respect its duties, it will be excluded from the LIS

➤ Liability

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➤ Suspension and termination

- End of the submission period

At the end of the submission period, if the partner doesn't submit again, His access to the LIS will be ended

- Exclusion from the LIS (in case of non respect of duties)

➤ Arbitration procedures

- The leading organization will be the responsible for arbitration of any conflict
- If needed, she will ask the stakeholder assembly (an assembly representative of every partner) to arbitrate the conflict, by a vote

### Partner

I, ....., legally authorised representative of the following organisation:....., declare that I accept, in the name of my organisation, to respect the duties assigned to the LIS users.

Date:

Signature:

---

### Leading organization

I,....., legally authorised representative of ....., the leading institution, declare that I accept, in the name of my organization, the subscription of .....

Date:

Signature:

### ANNEX I.2.1bis Stakeholders' general meeting matrix

[illegible]

## ANNEX I.2.2: IT competences matrix

[illegible]

### ANNEX 1.2.3: Test Table

Test Task	Test Date	Validation?	If necessary, problem encountered	Corrective measure undertaken
Check that minimum hardware/ software required is available				
Select a language (administration)				
Create a user profile (repeat all the following operations for each kind of user profile) (administration)				
Modify it (administration)				
Create a forum (administration)				
Post a message to the forum created (user)				
Read it(user)				
Delete the forum (administration)				
Edit and save metadata new records. (user)				
Attach to the record a set of keywords from the thesaurus, information about the temporal coverage, the spatial coverage, the use constraints: fill all the fields... (user)				
Attach to the record a data file, Define the access rights to download or view such a data file. (user)				
Use the search engine to find the data you have downloaded, using: the temporal feature, the spatial feature (by typing a location and by selecting a location from the list and by delimiting the area on the map), the keywords (by typing it and selecting it from the list)...(user)				
Select your data (user)				
View it with an appropriate viewer (Word, Excel, etc.) (user)				
Download it (user)				
Consult the definition of a specific term via the interactive glossary (user)				
Modify the metadata record (administration)				
Transfer of metadata, and data towards EUROSION server. (administration)				
Delete the metadata record (administration)				
Modify the user profile(administration)				
Delete the user profile(administration)				
Access control (administration)				

The test has to be adapted to the functions chosen for a specific LIS

## ANNEX I.3.1: Resignation form

Last name: .....

First name: .....

Position: .....

Organisation: .....

Date of subscription to the LIS : .....

Telephone: .....

Fax: .....

Email: .....

### The filled out form should be returned to:

The leading institution responsible .....

.....  
.....  
.....  
.....

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I, ....., legally authorised representative of the following organisation:..... ,  
declare that I, in the name of my organisation, want to resign from the LIS.

Date:

Signature:

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**For which reason did you decide to resign?**

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**Thank you for answering the question!**

## ANNEX I.3.1bis: Submission form

Last name: .....

First name: .....

Position: .....

Organisation: .....

Telephone: .....

Fax: .....

Email: .....

### The filled out form should be returned to:

The leading institution responsible .....

.....

.....

.....

.....

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I, ....., legally authorised representative of the following organisation:..... ,  
declare that I accept, in the name of my organisation, to subscribe to the LIS.

Date:

Signature:

**The signed Memorandum of understanding and the LIS Feasibility and pre-design survey must be completed and sent with this form.**

---

Would you be interested in a training session about the use of the LIS?

☐ Yes      ☐ No

If yes, how many people would you like to be trained?

.....

**Thank you for answering the questions!**



## ANNEX I.3.2: Conflict form

### Nature of the conflict:

1. Please sum up the nature of the conflict:

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2. What is the nature of the conflict:

▪ Legal?

☐ Yes

☐ No

▪ Technical?

☐ Yes

☐ No

▪ Economical?

☐ Yes

☐ No

▪ Political?

☐ Yes

☐ No

3. Who are the main actors of the conflict?

Name of the organization	Type of responsibility (Policy, Operational, Research/Scientific, other)	Short description of responsibility	Representative persons (General manager, and contact person)	Contact information (address, tel, fax, email)

4. Please sum up in maximum five lines the measures undertaken.

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.....

5. Please sum up in maximum five lines the outcome of those measures

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### ANNEX I.3.3: Annual Budget Plan

	First Quarter		Second Quarter		Third Quarter		Fourth Quarter	
Meeting with all stakeholders	Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)	
	Multiplication of documents		Multiplication of documents		Multiplication of documents		Multiplication of documents	
	Coffe break		Coffe break		Coffe break		Coffe break	
	* Human resources costs		* Human resources costs		* Human resources costs		* Human resources costs	
Staff Training	Training costs (IT firm or LIS manager)		Training costs (IT firm or LIS manager)		Training costs (IT firm or LIS manager)		Training costs (IT firm or LIS manager)	
	* Human resources costs		* Human resources costs		* Human resources costs		* Human resources costs	
Marketing	Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)		Communication costs (Phoning, Registered letters, Internet)	
	* Human resources costs		* Human resources costs		* Human resources costs		* Human resources costs	
Maintenance and technical support	Maintenance		Maintenance		Maintenance		Maintenance	
	Technical support		Technical support		Technical support		Technical support	
	Hosting		Hosting		Hosting		Hosting	
	total costs		total costs		total costs		total costs	

\*Advice: To take into account the cost of premise rent and office furnitures and supplies, the cost of human resource (salary + charges) can be multiplied by 1.7

### ANNEX I.3.3bis: Annual Budget meeting

[illegible]

## ANNEX I381: User Satisfaction Survey

The content of the following survey is not mandatory and can be adapted to specificities of a particular LIS.

Please, indicate your satisfaction toward the LIS in the following areas:

*From 1: I'm not satisfied at all, to 5 I'm completely satisfied*

<b>Searching for information</b>	
- on policies?	
- on physical and ecological processes?	
- on technical solutions?	
- on socio-economy?	
- on social perception?	
- on information management ?	
<b>Downloading information</b>	
- on policies?	
- on physical and ecological processes?	
- on technical solutions?	
- on socio-economy?	
- on social perception?	
- on information management ?	
<b>Uploading information</b>	
- on policies?	
- on physical and ecological processes?	
- on technical solutions?	
- on socio-economy?	
- on social perception?	
- on information management ?	
<b>Participating to forums</b>	

How many people work in your organization?	
How many people use the LIS in your organization?	
% of people using the LIS in your organization	

Thank you for answering the questions!

## ANNEX I383: LIS performance report

### 1. LIS Performance Indicators

#### a. Stakeholders

Table 1: Number of organization subscribing to the LIS:

	Local level	Regional level	National level	International level	Total
Policy maker					
Operational bodies					
Arbitration bodies					
Advisory/consultative bodies					
Others					
Total					

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
Number of organizations					

Analysis: .....

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#### b. Sites Visits

Table 2: Number of visitors per month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
Number of visitors													

Table 3: Number of visitors per year

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
Number of visitors					

Analysis: .....

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c. Number of download

Table 4: Number of Download per month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
On policies													
On physical and ecological processes													
On technical solutions?													
On socio-economy													
On social perception													
On information management													
Total													

Table 5: Number of download per year

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
On policies					
On physical and ecological processes					
On technical solutions?					
On socio-economy					
On social perception					
On information management					
Total					

Analysis: .....

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d. Number of upload

Table 6: Number of upload per month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
On policies													
On physical and ecological processes													
On technical solutions?													
On socio-economy													
On social perception													
On information management													
Total													

Table 7: Number of upload per year

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
On policies					
On physical and ecological processes					
On technical solutions?					
On socio-economy					
On social perception					
On information management					
Total					

Analysis: .....

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e. Number of messages posted on forums

Table 6: Number of messages posted on forums per month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
On policies													
On physical and ecological processes													
On technical solutions?													
On socio-economy													
On social perception													
On information management													
Total													

Table 7: Number of messages posted on forums per year

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
On policies					
On physical and ecological processes					
On technical solutions?					
On socio-economy					
On social perception					
On information management					
Total					

Analysis: .....

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## 2. User Satisfaction survey

- a. Average % of stakeholders' employees using the LIS: **XX%**.

*Table 8: Average % of stakeholders' employees using the LIS per year*

	Year n-4	Year n-3	Year n-2	Year n-1	Year n
Number of visitors					

Analysis: .....

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- b. Stakeholders' satisfaction indices average (From 1: I'm not satisfied at all, to 5 I'm completely satisfied)

Searching for information	
- on policies	
- on physical and ecological processes	
- on technical solutions	
- on socio-economy	
- on social perception	
- on information management	
Downloading information	
- on policies	
- on physical and ecological processes	
- on technical solutions	
- on socio-economy	
- on social perception	
- on information management	
Uploading information	
- on policies	
- on physical and ecological processes	
- on technical solutions	
- on socio-economy	
- on social perception	
- on information management	
Participating to forums	

Analysis: .....

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