INESCTEC

TECHNOLOGY & SCIENCE
ASSOCIATE LABORATORY

COORDINATED BY
INESCPORTO
PORTUGAL

PLAN FOR SUPPORTING ACTIVITIES

1 INTRODUCTION

The plan for the supporting activities presents in detail a large department – Information and Logistics (DIL) – and several other Supporting Services:

- Communications and Computer Support Service
- Business Informatics Service
- Communication Support Service
- Infrastructure Maintenance Support Service
- Library and Documentation Support Service

For DIL, we use a simplified version of the format used for the operational units. For the other Supporting Services, we present a list of actions only.

2 DEPARTMENT OF INFORMATION AND LOGISTICS

Coordinator: Maria da Graça Barbosa

2.1 SHORT PRESENTATION OF THE DEPARTMENT

The Department of Information and Logistics (DIL) is a polyvalent, multi-skilled structure that aims to assure, in an integrated way, the information, administrative and organizational support necessary to INESC TEC's good functioning. It incorporates most of the administrative support functions as well as some specialised support functions, specialized analysis and advice, contributing decisively to the preparation and substantiation of the decisions made by the authorized bodies.

Currently, DIL seeks to take full advantage of the Intranet's potentialities, aiming to offer more complete and updated information of relevance to the institution, as well as making available the rules and procedures in force.

DIL also seeks to increase the efficiency of the services rendered upon the simplification and automation of the processes.

2.2 DEPARTMENT ORGANIZATIONAL STRUCTURE AND TEAM

The current structure has been reasonably stable for years, corresponding to the functions required by the type of activity that has been carried out by INESC TEC. Since January 2009, the logistic support was transferred to the Infrastructures Management Service. Focusing on information, organizational and management support, the Department organizational structure includes the General Coordination and five main functional areas:

- Human Resources
- Accountancy and Finance
- Management Control
- Legal Support
- Secretariat Coordination

The Department team has been strengthened in order to maintain the service level in a larger institution. The current composition and planned evolution is presented in the following table:

Department team composition

Source			2010	2011 (1)	2012 (Plan)
Internal HR	R&D	Employees			
		University and Polytechnic			
		Grant Holders and Trainees (PG)			
		Total R&D			
	Shared Structure (Central and Local)		17	19	20
	Total Internal		*17*	*19*	*20*
External Collaborators and Invited Researchers					
	Global Total		17	19	20

(1) Information at the time of the elaboration of the present Plan

The functional areas are briefly described as follows.

Human Resources
Manager: Maria da Graça Barbosa

Coordination and execution of all activities concerning administrative management of human resources, as well as the actions necessary to the fulfilment of the legal and budgetary obligations. Follow-up and management of INESC TEC's insurances related to people, namely Health Insurance, Personal Accidents and Work Accidents, as well as the follow-up and control of the services rendered by the hired company in the area of Health, Hygiene and Occupational Safety.

Accountancy and Finance
Manager: Paula Faria

Coordination and execution of the activities of general accountancy and financial management, as well as the necessary actions to the fulfilment of the tax obligations Due to the increase of workload in this area, an R&D Management grant was attributed in 2011.

Management Control
Manager: Marta Barbas

Coordination and execution of the activities regarding planning and budgetary control and management information. Support to the submission of applications of funded projects and administrative, economic and financial management of these projects. Due to the increase of workload in this area, one R&D Management grant was attributed in 2011 and another admission is foreseen in 2012.

Legal Support
Manager: Maria da Graça Barbosa

Juridical support to the institution, in terms of information, advice, prevention and solving of problems and verification of the legal and statutory conformity of acts and contracts, maintenance and update of the institutional documentation. It also supports the functioning of the associative bodies of INESC Porto, particularly the Board of Directors and the General Council.

Secretarial Coordination
Manager: Lídia Vilas Boas

Coordination of the Secretaries of Units, Support Services and Department, in order to guarantee the coherence of the typical procedures of those functions, as well as to ensure homogeneity and control the compliance with the internal rules and procedures. The person in charge of these functions is allocated to it in part-time, maintaining her main functions as Board of Directors' secretary.

2.3 STRATEGIC ANALYSIS - SWOT ANALYSIS

2.3.1 INTERNAL FACTORS

Strengths (characteristics of the Department that give it advantages)

ID	Description
S1	Integrated and interdisciplinary services under a common coordination has proved to enable a more coherent, informed and effective response.
S2	The engagement in the continuous improvement of the key-elements' work methods, as well as the investment in training directly related with the function, whether professional or post-graduate, enables a global increase of

ID	Description
	DIL's response capacity, reducing the need to resort to external advisory to the minimum.
S3	The fine organization of information and its adaptation to several purposes has been recognized even as a case of best practice model.
S4	The institution itself has become a reference of best practices in certain areas covered by DIL, such as administrative and financial project management, public procurement procedures, some topics of human resources administrative management, etc.
S5	The closer collaboration with other support services in order to improve DIL's response, namely, benefit from new enhanced workflow solutions to simplify and reorganize some internal processes (SIG) or ameliorate the graphic image of institutional forms, reports, etc. (SCOM).

Weaknesses (characteristics that place the Department at a disadvantage)

ID	Description
W1	Some difficulties in identifying, conceiving and implementing measures of rationalization and automation of processes.
W2	Some discrepancies in terms of qualifications and capacity of response and, consequently, in terms of amount of work and level of responsibility assigned to each employee.
W3	Difficulty in improving fruitful collaboration between areas.
W4	Lack of knowledge and experience in certain areas.

2.3.2 EXTERNAL FACTORS

Opportunities (external chances to improve performance)

ID	Description
O1	The exploitation of partnerships with external entities, from which improvements in procedures and implementation of best practices may result.
O2	The actual demand of DIL's expertise by external entities may be favourable to the inclusion of such expertise in the array of services and competences offered by the institution to its stakeholders and, consequently, be an additional source of revenue.

Threats (external elements in the environment that could cause trouble for the Unit)

ID	Description
T1	The increasing complexity and burden of the management of funded projects consume too much time and energy of several persons in the department, deviating them from their value-added core functions.
T2	The enlargement of INESC TEC Associated Laboratory, with several poles geographically dispersed, which added administrative and control work and is proving to be a significant overload of work for the actual size and structure of the Department.
T3	The unavailability to take advantage of the opportunities that may arise, due to above mentioned increase of workload or lack of cooperation between areas.
T4	The implementation of a new management model for INESC TEC, with greater autonomy for Units, which may require new administrative and control methods, as well as improved communications and electronic platforms.
T5	The current economic and financial crisis, which will bring increasing difficulties to the financial management and therefore, to the global management, will certainly require new control measures.
T6	In the current crisis context, the number and frequency of alterations of rules (tax, funding, labour, public procurement, etc.) will certainly be more frequent, demanding a great capacity of immediate adaptation.

2.4 STRATEGIC FORMULATION

2.4.1 MAIN OBJECTIVES- MEDIUM AND SHORT TERM

The following main medium and short term strategic objectives are established as a consequence of considering the previous SWOT analysis, and establish the framework for the actions presented in the next section.

Strategic Objectives

ID	Description	Relationship to SWOT analysis			
		S	W	O	T
OBJ1	Maintain or increase the capacity of response to new problems and situations, namely by obtaining new competences.	S1 S2	W1 W2 W4	O1 O2	T2 T4 T6
OBJ2	Support the management of the enlargement process of INESC TEC - Associated Laboratory, in terms of articulation of scientific and contractual activities, budget and accountability, human resources, reorganization of processes etc.	S1 S3	W1	O1	T2 T4
OBJ3	Support the implementation of the new management model of INESC TEC, namely through a simplification, improvement and automation of processes:	S1 S2 S3 S5	W1 W4		T1 T2 T4
OBJ4	Improve information gathering, analysis and release, in several supports and in less time, for management decisions purposes.	S1 S2 S3	W1		T1 T2 T4
OBJ5	Support the balance and diversification of funding sources.	S1 S4		O1	T1 T5
OBJ6	Support the economic valorisation of knowledge.	S2	W4		T5
OBJ7	Improve the mutual knowledge and fruitful cooperation between areas within the Department.		W3		T3
OBJ8	Include the Department's expertise in the array of services and competences offered by the institution to its stakeholders and, consequently, be an additional source of revenue.	S2 S4		O2	

2.5 SRATEGIC IMPLEMENTATION

2.5.1 MAIN INITIATIVES / ACTIONS FOR THE YEAR

All the actions mentioned below, most of which already started, aim to contribute to a better management and valorisation of resources (human, material, financial and intellectual) and to a greater efficiency of the processes, as well as to the carrying out of the strategic guidelines established by the Board of Directors.

ID	Description	Relationship to medium and short term objectives (1)							
		OBJ1	OBJ2	OBJ3	OBJ4	OBJ5	OBJ6	OBJ7	OBJ8
A1	Search for adequate continuous training, research, benchmarking, networking, etc., that may help the acquisition or of new competencies and consolidation or updating of existing ones.	H			M		H		
A2	Provide training or information sessions, periodically or whenever it is necessary, whether for the project managers or for the secretaries.		H	M	M				
A3	Collaboration in the automation of the processes of Collaborator's admission and renewal, that ensures the automatic collection and registration of data in the Personnel Database.		M	H	M				
A4	Collaboration in the reorganization and migration of acquisitions and travels processes to the new workflow system.	L	H	H					
A5	Collaboration in the reorganization of business management processes, namely with the implementation of electronic approval workflows at different management levels.	L	H	H					
A6	Reviewing and enriching of the information and documentation published by DIL in the Intranet and Internet sites: improve accessibility and the organization of the information.		H	M	H				
A7	Contribution to the search and diversification of INESC Porto's funding sources: search and publicize funding opportunities; encourage and help researchers to submit proposals.					H			
A8	Collaboration in the development and implementation of a Balanced Scorecard for INESC Porto and a new individual performance management system.		M	M	H				
A9	Creation of mixt task forces, involving people from different areas, with a common target and committed to joint results.							H	
A10	Promotion of DIL general meetings on pre-determined topics and continue the Inter-area coordination periodic meetings.	M						H	

ID	Description	Relationship to medium and short term objectives (1)							
		OBJ1	OBJ2	OBJ3	OBJ4	OBJ5	OBJ6	OBJ7	OBJ8
A11	Service rendering to external entities (FCT, INEGI, partner companies), or collaboration in the Units' contracts and projects.							H	H

(1) "Blank" – no direct relationship / contribution; L – Low or weak relationship / contribution; M – Medium relationship / contribution; H – High or strong relationship / contribution

2.5.2 OTHER INITIATIVES / ACTIONS FOR THE YEAR

Specific initiatives / actions will be carried out during 2012 in each functional area:

Human Resources Area

- Extension of the automated process of Recruitment, Selection and hiring of human resources to other categories of collaborators and other stages of the process;
- Search for more opportunities of recruitment , such as employment fairs;
- Improvement of the welcome and integration process of new collaborators;
- Improvement of the processes of collection, integration and processing of the information for the purpose of the Single Social Report, compliance with the New Contributory Code and, in general, facilitating the supply of information for several purposes;
- Collaboration in the specification of an automated process for managing the Complementary Payments;
- Contribution to define a human resources policy that takes into account the factors of attraction for the several types of collaborators;
- Collaboration in the "CONNECT INESC TEC" project, that aims to create a network of connections between collaborators that leave INESC Porto and the institute.

Accountancy and Finance Area

- Promotion of the establishment of partnerships with Financial Institutions, in the technological areas, in articulation with the Board of Directors and the research Units;
- Update of the handbook on procedures of the accountancy and Finance Area;
- Implementation and adaptation to the new accounting standards that will be in force from the 1st January 2012 on (creation of the accounts' codes and financial statements);
- Organization and accompaniment of financial activity at INESC Porto in Brazil;
- Continuing the simplification of accounting process to include in the information system SAP.

Management Control Area

- Creation and development of an Internal Audit Plan;
- Maintenance of a repository of rules and procedures for funded projects; Feed intranet with proper contents;
- Development of the activities of National Contact Point for ICT theme under FP7, through a contract with FCT;
- Study and implementation of a more efficient overhead rate applied to funded projects.

Legal Support Area

- Collaboration in the implementation of the Handbook on Intellectual Property, in articulation with the Innovation and Technology Transfer Unit (UITT):
- Legal support to the participation of INESC Porto in companies and associations;
- Legal support to the institution's internationalization projects, namely the creation of INESC P&D Brazil;
- Reviewing drafts of frequently asked documents (contracts, declarations, etc.), relevant legislation, updating of the frequently asked questions, as well as relevant institutional documentation;
- Launching and accompanying of several public procurement procedures;
- Divulge and implement the legal changes that are approved.

Secretarial Coordination

- Verify and support the use of intranet applications such as ULTIMUS Workflow, SACA and other process management applications by the secretaries, suggesting changes and improvements
- Suggest that secretariat daily tasks that may be object of a management application processes, in order to create more efficiency within the Unit;
- Continuous planning of the Secretaries' training
- Production of a chart/map that states the tasks that are performed by the several secretaries as a way to compare the different usage of these human resources in the different Units and make the coordinators aware of a more efficient use of them.

3   SUPPORT SERVICES

The activity of the Support Services for 2012 is characterised by the main actions to be carried out, as presented in the following sections.

3.1   COMMUNICATIONS AND COMPUTER SUPPORT SERVICE

Action	Description	Schedule
AAA service	Maintenance and deployment of new tools for the Authentication, Authorization and Accounting service. Deploy the infrastructure for a Single Sign On service.	Annual Task
VoIP	Installation and interoperability configuration of the new versions of the VoIP systems and services.	Annual Task
IPv6	Migration to full IPv6 infrastructure support.	Third Quarter
Electronic mail (E-mail)	Introduction of new engines for SPAM filtering.	Annual Task
	Reorganization and refinement of the mail servers' management tools and procedures.	
	Development, configuration, installation and deployment of new services in INESC Porto network.	
Calendar and Agendas Management service	Full deployment of calendar and agendas management service.	First Semester
New network services	Restructuring of the Wi-Fi network infrastructure and introduction of new access service for INESC Porto visitors.	Annual Task
Systems Backup	Support services (help-desk) for all INESC Porto users.	Annual Task
Users support	Technical support service for internal IT purchase processes.	Annual Task
	Development of a new version of the Communications and Computer Service web site, supporting more user interactivity and facilities to access the software and network databases.	
	IT infrastructure management and maintenance and related services.	
New building IT infrastructure acquisition	Market analysis, evaluate, test, manage the acquisitions process for the IT infrastructure of the new building .	First and Second Quarter
New building IT infrastructure install	Installation and configuration of network and data infrastructure for INESC Porto new building.	Second and Third Quarter
IT infrastructure management and maintenance	Maintenance and support contract management, covering the IT infrastructure and software applications.	Annual Task
	Periodic auditing of systems installed software and network access.	
	Consulting services and tasks, by request of external entities or in cooperation with other Units.	
Specialized consulting services	Organization of short term training actions and traineeships.	Sporadic Tasks

3.2 BUSINESS INFORMATICS SERVICE

Action	Description	Schedule
Development of business workflow solutions	Conversion of the existing electronic forms to a common workflow system (conclusion).	Whole year
	Identification and specification of additional business processes, with the purpose of its electronic support.	
	Implementation of selected processes in the workflow system.	
Enhanced of INESC Porto Website	Migration of Content Management System to Plone 4 (public site).	First semester
	Support of new website design.	
	Enhanced performance, authentication, security and redundancy.	Whole year
Collaboration in the development of the Units' projects and conferences websites	Support to the Units and Services in the creation of project areas in the collaborative platform.	First trimester
	Support to the Units and Services in the creation of the necessary websites.	Whole year
Development of databases and applications to support internal management functions	Implementation of a database for projects, with interoperability capabilities with Associates information systems.	First semester
	Implementation of a basic Customer Relationship Management (CRM) system.	First trimester
	Re-structuring of the publication database (SACA) with interoperability capabilities with Associates information systems.	Second semester
Maintenance of management applications, integration of information among applications, etc.	Maintenance of the Website, Ultimus, Workflow, SACA, PHC Personal, etc.	Whole year
Collaboration in specific projects	As required by Units.	Whole year

3.3 COMMUNICATION SUPPORT SERVICE

Action	Description	Schedule
Promoting and intensifying external communication activities, including media dissemination and Communication of Science initiatives	Publication of news and articles in the most relevant media (newspapers, radio and television). The aim is to guarantee the publication or release of (at least) one news item per month on INESC TEC's activity.	Annual Task
	Creating a new website and inserting contents in Portuguese and in English regularly. The website should be designed in conformity with the excellence of INESC Porto and INESC TEC. It should be aesthetically appealing and more functional/effective for potential partners and clients.	Second Semester
	Organising the institution's participation in external events, such as exhibitions and other promoting initiatives.	Annual Task

Action	Description	Schedule
	Producing BIP – Bulletin of INESC TEC. Every year, 11 editions are produced in Portuguese (disseminated to associates, partners, clients and journalists) and 4 in English (disseminated to Universities and Faculties from 25 different countries).	Annual Task
	Providing support to the R&D Units in the dissemination of national and European projects. Producing contents and creating a graphic image for communication material developed within R&D projects.	Annual Task
	Developing scientific awareness initiatives for youngsters and for citizens in general. Organising student visits to the building and participating in events, in a continuous effort to develop the Communication of Science at INESC TEC.	Annual Task
	Disseminating INESC TEC's activity in the social networks Facebook and Twitter. The main objective is to attract high quality human resources. Contents and images will be updated daily.	Annual Task
	Developing initiatives to support the communication strategy for the new building "Centre of Knowledge on Sustainable Energy". The activities include press releases to provide information on the new building and its mission, developing a corporate image and other communication material.	Annual Task
Organising internal communication activities and multimedia issues	Promoting internal communication initiatives for the INESC TEC community. The initiatives include organising sports, interaction and leisure events, art and cultural exhibitions, and other initiatives that promote an institutional culture and the integration of the most recent units, such as CISTER and HasLab.	Annual Task
Organising internal communication activities and multimedia issues	Producing BIP – Bulletin of INESC TEC. Collecting and processing information and images to include in BIP. Every year, 11 editions are produced with the collaboration of several researchers who send opinion articles or suggest interesting topics for news.	Annual Task
	Photo and video coverage of internal and external events, upon request by the Units. Maintaining a photo archive on the Intranet.	Annual Task
Training Sessions to improve the quality and efficiency of the researchers' performance dealing with the media and writing academic articles	Organising Media Training sessions for INESC TEC's researchers. The training sessions will make it easier for them to communicate with the media more effectively.	First Semester
	Organising sessions on Academic Writing for INESC TEC's researchers. The training sessions will help them improve their English writing skills which they can use to write better academic articles for journals.	First Semester
	Supporting the Board of Directors and the Units of INESC TEC, providing translation and text revision services (Portuguese>English and English>Portuguese) for the different research areas.	Annual Task

3.4 INFRASTRUCTURE MAINTENANCE SUPPORT SERVICE

Action	Description	Schedule
Buildings' management and maintenance	Management of the provision of services associated with the operation and maintenance of the buildings. Buildings maintenance.	Annual Task
Support to the Units' electronic production activities	Offering of infrastructures and material for the electronic production (in collaboration with UOSE).	Annual Task
Support the construction of the new building	Construction management, monitoring and control.	Annual Task

3.5 LIBRARY AND DOCUMENTATION SUPPORT SERVICE

Action	Description	Schedule
Management and deployment of the interface with FEUP's library.	Support to the deployment of the agreement between INESC Porto and FEUP for the management of the library and documentation services.	Annual Task
Inventory of INESC Porto's documental heritage	Cataloguing of the institution's publications including books, magazines, theses and multimedia material.	Annual Task