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D4.1 Roadmap templates to support the cluster members in the assembly of raw roadmaps

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CO	Confidential, only for members of the consortium (including the Commission Service)	

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1 Executive summary

The deliverable **D4.1 - Roadmap templates to support the cluster members in the assembly of raw roadmaps** is the first deliverable of WP4. The purpose of this document is to describe the procedure and provide supporting documents that will be used in creating the ENGAGED roadmaps as final results of the work package.

The document first gives an overview of the rationale in deciding on the structure of the ENGAGED roadmap, using best practices by third party sources. In the following the roadmap template is described in detail.

The next part summarises the Action Plans of the different Action Groups within EIP AHA. The input of those to the ENGAGED roadmap is discussed in detail and potential topics for the ENGAGED workshops are suggested.

The next part of the document outlines templates for both workshop agenda and minutes that are specifically tailored to simplify the collection of the inputs relevant to the future roadmaps. Help is provided to the minute takers on filling out the templates, by giving detailed examples on all relevant parts and sections.

The document concludes with a résumé and two annexes providing two blank templates for structural roadmap and workshop summary, respectively.

2 Introduction

The objectives of this work package are to consolidate the results of the WP3 workshop discussions into roadmaps that point out, how the market uptake of AHA (Active & Healthy Ageing) solutions (within specific regions) can be facilitated, and to spread these roadmaps among the AHA community. To this end, WP4 will strongly rely on input that will be delivered by clusters of regions, member states, and/or projects. The "roadmap generation clusters" will be formed during the matchmaking event/mutual learning workshops of WP3. In these clusters also the input of the action plans of the action groups of the EIP AHA will be used. In the end of September 2012 the action groups produced these action plans. The clusters will identify how they can contribute to the common issues of these plans by the means of the roadmaps. In line with the objective, this work package will help the ENGAGED project to contribute to the implementation-oriented activities in the action plans of the action groups of the EIP AHA. "Strategic Implementation Plan" by enhancing the deployment process of independent living solutions.

This deliverable is the first result of task 4.1 that is concerned with the generation and provision of roadmap templates to the members of the roadmap generation clusters. The roadmap templates will support the cluster members in the assembly of raw roadmaps, which will then serve as a basis for the roadmap consolidation process of task 4.2. Partners of this work package will directly participate at the matchmaking events and mutual learning workshops which will be organized by WP3 and - if required - they will instruct the members of the roadmap generation clusters in the correct usage of the roadmap templates.

This deliverable has four major sections. At first we outline the rationale of creating such a template and how this will be reflected in the future creation of the ENGAGED roadmap. The next section will be a short analysis of the action plans presented by the six different action groups of EIP AHA. This action plans are a driving aspects that will define various important aspects of the roadmap creation within WP4. After that we give a short tutorial on the proper usage and layout of the workshop summary template that will be used in the workshops of WP3 to provide a concise form of input, thus allowing a swift and methodical approach to consolidating the different inputs into the ENGAGED roadmap. The final large part is an annotated exemplary workshop summary template based on the first workshop to be held in Bari, Italy on September 4th, 2013.

3 Roadmap Template

3.1 Rationale

The roadmap to be created in the scope of WP4 has to consider various sources of input in order to achieve a complete result. A first, important source is the best practice in this regard, that gives information about the structure of the template and indicators on what is the suitable content.

Management and consulting companies have created numerous sources that give an overview of how to create a suitable roadmap¹. The typical steps are:

1. Develop a clear and unambiguous understanding of the current state
2. Define the desired end state
3. Conduct a Gap Analysis exercise
4. Prioritize the findings from the Gap Analysis exercise into a series of gap closure strategies
5. Discover the optimum sequence of actions (recognizing predecessor – successor relationships)
6. Develop and Publish the Road Map

A suitable roadmap template should support all those steps by acting as both framework and guideline.

The template should take into account similar initiatives and how they have created their own roadmaps. This is more relevant as input for the content of the roadmap and less relevant regarding the structure. We will analyse the roadmaps of the different EIP AHA action groups and present our results in section 4.

In this early phase of the roadmap definition it is important to use a loose model that allows for flexible and dynamic restructuring of states, timeframes, objectives and milestones. Therefore we will be using a model consisting of streams, states and items.

A stream is a topical collection, e.g. innovative procurement, the topic of the first workshop held in Bari, could be a stream.

Each stream must provide the current state and the desired final state at the end of the process. We can also name those prerequisites and objectives.

To reach the desired state each stream will have to perform various tasks, that take a certain time - here they are called items, to allow a definition of both tasks and other potential entities within the roadmap.

¹ <http://pragmaticarchitect.wordpress.com/2011/03/05/how-to-build-a-roadmap/>

3.2 Structural roadmap template

This is an annotated roadmap template that comments the different sections to be filled in the actual roadmap. The legend is as follows:



Ongoing items are indicated by a green box



Completed items are indicated by a red box



Future items are indicated by a purple box



Milestones are indicated with an arrow + line and their numbering added. There must be a specific list of milestones added to the roadmap

See Appendix B for larger uncommented version.

ENGAGED Roadmap	<i>Current state</i>	<i>2014</i>	<i>2015</i>	<i>...</i>	<i>Desired state</i>
Name of stream 1 Here you should shortly describe stream 1, the main objectives and goals in a few lines	<ul style="list-style-type: none"> Bullets Describing Current State 				<ul style="list-style-type: none"> Bullets Describing Desired State
Name of stream 2 Here you should shortly describe stream 2, the main objectives and goals in a few lines	<ul style="list-style-type: none"> Bullets Describing Current State 				<ul style="list-style-type: none"> Bullets Describing Desired State
Name of stream 3 Here you should shortly describe stream 3, the main objectives and goals in a few lines	<ul style="list-style-type: none"> Bullets Describing Current State 				<ul style="list-style-type: none"> Bullets Describing Desired State
Name of stream n Here you should shortly describe stream 4, the main objectives and goals in a few lines	<ul style="list-style-type: none"> Bullets Describing Current State 				<ul style="list-style-type: none"> Bullets Describing Desired State
		 M1	 M2		 M3

4 Analysis of Action Group Plans

4.1 Action Group Overview

The pilot European Innovation Partnership on Active and Healthy Ageing aims to increase the average healthy lifespan in the EU by 2 years by 2020. The European Commission periodically launches Invitations for Commitment, open to all stakeholders, for the submission of projects or initiatives that support the specific actions identified in the Strategic Implementation Plan. Candidates meeting the criteria (explained here), have been invited to join an Action Group dedicated to working on a Specific Action.

The Invitations for Commitment were first launched from the 29th of February to the 3rd of June 2012, upon the adoption of the Communication. The second Invitation for Commitments closed on the 28th February 2013.

This resulted in the following six different Action Groups:

- A1 Prescription and Adherence
- A2 Personalised Health Management
- A3 Prevention of Functional Decline and Frailty
- B3 Integrated Care for Chronic Diseases incl. Remote Monitoring
- C2 Interoperable Independent Living Solutions
- D4 Age-friendly Buildings, Cities & Environments

All Action Groups had to prepare specific Action Plans by September 2012. In this plans they laid out the specific objectives and activities to be taken in the timeframe from 2012-2015. In the following we outline the action plans of all different Action Groups.

4.2 Action Plan Summaries

4.2.1 A1 Prescription and Adherence

4.2.1.1 Objectives

Improve patients' adherence	Develop early warning systems, IT platforms, electronic tools, alerting systems, assessment tools, pharmaceutical care services, device to monitor drug compliance, integrated group programme to combine medical advice, adherence support services for community pharmacists.
Empowerment	Implement exercise training, consistent and reliable use of the «Teachback» approach, patient access to clinical information. Develop a web based social network, physically and intellectually stimulating social activities. Design specific content for informative campaigns. Carry out group therapeutic education and psychological and health counselling.
Contribute to the improvement of adherence in the health care system	Develop ICT solutions, a content sharing platform, cost monitoring programmes, electronic prescription tools. Design a specific informative campaign. Implement pharmaco-vigilance programmes and software, best practices and guidelines. Use of the SPARRA risk prediction algorithm, train health professionals.
Contribute to the research methodology and	Develop research on therapies and strategies for poly-medicated patients; an algorithm to identify indicators of adherence. Establish public-private approaches. Evaluate different strategies cost-effectiveness. Perform observational study, cost analysis, health technology assessment of innovative life style model. Use the Scottish patients algorithm
Foster communication	Design database and specific software to support IT platform. Create an EU database of clinical trials for older people. Share pharmaceutical care record across primary and secondary care.

4.2.1.2 Timeframe

2013	Monitoring & Observational Data
2014	Development and implementations of interventions
2015	Data analysis

4.2.2 A2 Personalised Health Management - Falls Detection

The action plan of A1 has five specific objectives:

Implement an integrated & person centred service pathway + technology	<ul style="list-style-type: none"> • Repository falls prevention/management programmes & care pathways • Toolkit for implementing tools & technologies • ICT solutions, devices & technologies
Data & Evidence	<ul style="list-style-type: none"> • Report current approaches to collecting falls data • Specification of a minimum falls dataset • Strategy on how to establish a European-wide central repository
Awareness, information & education to underpin the implementation	<ul style="list-style-type: none"> • Organise awareness campaign across the EU • Inventory successful public health& social marketing strategies • Inventory of best practice, evidence based training models & tools • Practical résumés of evidence • Training package to support the training of the workforce • Website with information on falls and fall prevention • Network of research & educational organisations
Governance: innovation, sustainability and scaling-up	<ul style="list-style-type: none"> • Assessment model • Governance & managerial resource repository • Promotional events & publications • Online marketplace & innovation platform

4.2.2.1 Timeframe

2013	Repository of programmes/resources, report of best practices, awareness campaign
2014	Toolkit definition, ICT solution implementation, evidence synthesis, training package
2015	Network of research and education, promotional events and publications

4.2.3 A3 Prevention of Functional Decline and Frailty

4.2.3.1 Objectives

Management Frailty and Functional Decline	<ul style="list-style-type: none"> E-learning tools and modules on prevention of frailty and functional decline, tailored to train health professionals.
Enhance participation and independence	<ul style="list-style-type: none"> Educational programmes for patients and caregivers on understanding physical frailty and the need to prevent progression of functional status from robust to pre-frail or frail by adopting preventive behaviour to improve physical and cognitive activity as well as good oral care and nutrition.
Promote systematic-routine screening for pre-frailty and Undernutrition	<ul style="list-style-type: none"> Implementation of nutrition screening policy in EU member states – 2 per year
Realise integrated pathways of care	<ul style="list-style-type: none"> Provide an integrated intervention (along care pathway) to prevent and delay the onset of physical frailty
Contribute to research and methodology on frailty and active and healthy ageing	<ul style="list-style-type: none"> Changes in biomarkers of metabolic disease including insulin resistance, free fatty acid levels and oxidative stress markers Elaboration of guidelines and recommendations for application in rehabilitation and mental health interventions.
Contribute to managing demand and increasing the sustainability of health care and social care	<ul style="list-style-type: none"> Increase sustainability of health and social care. Explore the aspects for a better economic understanding of frailty.
Awareness, information & education to underpin the implementation	<ul style="list-style-type: none"> Organise awareness campaign across the EU Inventory successful public health& social marketing strategies Inventory of best practice, evidence based training models & tools Practical résumés of evidence Training package to support the training of the workforce Website with information on falls and fall prevention Network of research & educational organisations

4.2.3.2 Timeframe

2013	Programme inventory, business models, training sessions, best practice collection
2014	Educational programmes, social networking strategies, screening tool creation, policy support, guidelines, events
2015	Biomarkers, scientific validation, intervention programmes, resource repository, screening programme, ICT interventions, network creation
2016-2017	Clinical trials, Telemedicine services, integrated service platform

4.2.4 B3 Integrated Care for Chronic Diseases incl. Remote Monitoring

4.2.4.1 Objectives

Organisational Models	<ul style="list-style-type: none"> • Map of partnership models for implementation of chronic and integrated care programmes • Toolkit for organisational models
Change Management – Incentivisation and Advocacy	<ul style="list-style-type: none"> • Map of best practice methodologies to implement chronic and integrated care • Toolkit for Change Management
Workforce Development, Education and Training	<ul style="list-style-type: none"> • Map of reusable learning resources • Toolkit for Workforce re-design, development, education and training
Risk Stratification - for optimised delivery of Integrated Care	<ul style="list-style-type: none"> • Map of existing patient stratification solutions • Toolkit for Risk Stratification
Care Pathway Implementation	<ul style="list-style-type: none"> • Map of best practice implementation in the EU regions • Toolkit for Integrated Care Pathways
Patient / user empowerment, health education and health promotion	<ul style="list-style-type: none"> • Map of coaching, education or approaches • Toolkit for patient empowerment and adherence
Electronic Care Records / ICT / Teleservices	<ul style="list-style-type: none"> • Map of ICT solutions focusing on how services for chronic disease management or integrated care are being supported by eHealth infrastructure • Toolkit for Electronic Care Records / ICT / Teleservices

4.2.4.2 Timeframe

2013	Mapping of the different action plan objectives
2014	Organisational toolkit definition and electronic care record toolkit
2015	Definition of toolkits in the various different action areas

4.2.5 C2 Interoperable Independent Living Solutions

4.2.5.1 Objectives

Collecting and sharing practices	<ul style="list-style-type: none"> Guidelines on how to implement innovative procurement Set of good practice documents for the implementation of independent living solutions and recommendations
Analysis, guidelines, recommendations	<ul style="list-style-type: none"> Identification of “fit for purpose” co-operation platform Recommendations for interoperability process and standardisation Toolkit/guidance for user empowerment A report that identifies the current social and economic return on investment on existing implementations
Promotion & Dissemination	<ul style="list-style-type: none"> European AHA cooperation platform to incorporate continuous learning A self-sustainable repository of information, practice and evidence

4.2.5.2 Timeframe

2013	Cooperation platform, interoperability recommendations, best practice documents
2014	Toolkit & guidance for user empowerment
2015	Procurement guidelines, AHA continuous learning platform, information repository, economic and social impact report

4.2.6 D4 Age-friendly Buildings, Cities & Environments

4.2.6.1 Objectives

Implementing Policies and Practices for Regions, Cities and Communities	<ul style="list-style-type: none"> develop activities to enhance participation of older people at local level (users' council, older people's fora, platform, citizens dialogue, etc.) and to connect the voice of older people in place
Networks promoting an EU Covenant on Demographic Change	<ul style="list-style-type: none"> launch & analyse results of a questionnaire to LRAs to collect grass root views on their needs and potential benefit of an EU initiative such as a Covenant on Demographic Changes
The Spatial Context	<ul style="list-style-type: none"> Joint initiatives into the links between spatial context, cost effectiveness, population health, participation and wellbeing of older people
ICT and Smart Environments	<ul style="list-style-type: none"> Increase the effectiveness of innovative solutions based on ICT products, & applications and services in order to promote age-friendly environments

4.2.6.2 Timeframe

2013	Guideline adaptation, mapping available resources, best practice & state-of-the-art
2014	Modelling and monitoring, ICT guidelines & interoperability standards complete, ICT solution development in progress
2015	Intervention/evidence reported, ICT solutions evaluated

4.3 Influence on ENGAGED Roadmap

4.3.1 Structural Input



Figure 1. Development cycle

All action groups have defined individual roadmaps over the timeframe of 2013-2015 and sometimes even beyond. They all follow a similar strategy of following a classical development cycle comprised of the different phases assessment, definition and execution, as shown in Figure 1.

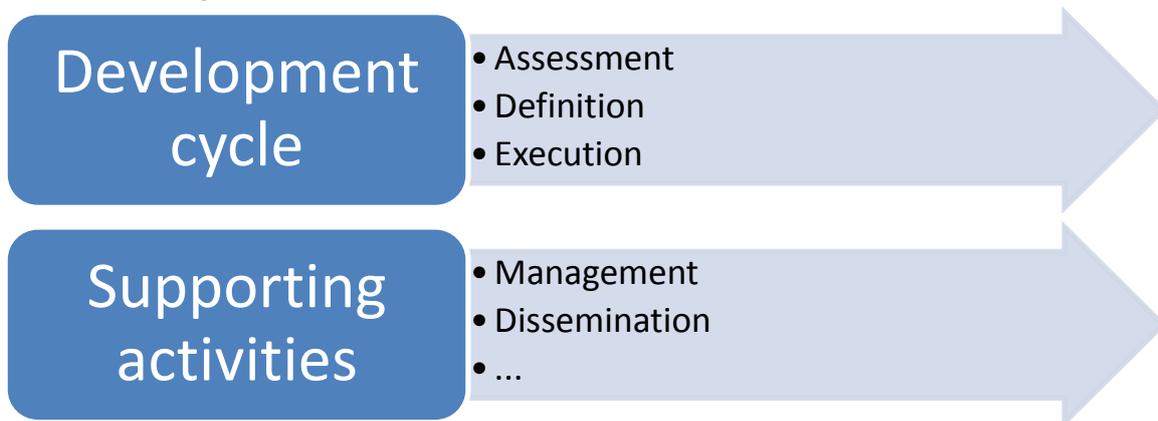


Figure 2. Action group work plan template

This is typically augmented by various supporting activities, such as project management, dissemination or exploitation that are performed in parallel to the development. The overall work plan template they are using can therefore be consolidated to the model shown in Figure 2.

4.4 Content-related Input

The different Action Groups of EIP AHA are tackling different topics in the Active Healthy Ageing domain. Their input is not only related to the previously presented structural influences but even more importantly there is a collection of topics, ideas and approaches that should influence the creation process of the ENGAGED roadmap. This is only a first draft collection based on an analysis of the different Action Plans that were summarised in section 4.2. The following subsections will outline the areas that might be discussed in the associated workshops of WP3.

4.4.1 Connecting and Consolidating Local Sources

All the Action Groups of EIP AHA have processes and tasks that are collecting information from local sources, such as taking national databases and consolidate those to a European database. Another example is collecting international data regarding falls to create a repository accessible for research and professionals.

Creating such consolidated data sources is particularly important given the considerable amount of effort that has been put in already by local initiatives. ENGAGED should analyse the results of these local initiatives to avoid redundancy and optimize resource usage.

4.4.2 Linking Research and Industry

Another important aspect that plays a larger role in all Action Groups is the close link between research institutions and industry partners. To achieve sustainable results it is important to consider marketable solutions and identify potential business plans for both existing industries and start-ups that may be supported by the results created in the various activities.

Without this link, the achievement of a significant impact may become prohibitive. Thus such link must be strongly considered in the ENGAGED workshops and roadmap.

4.4.3 Training and Education

Whenever some results have been achieved it is pivotal to spread these throughout the active community in this domain, i.e. potential users of the specific solutions. In this regards all Action Groups have activities to train medical personnel or other professionals in the usage of the developed procedures and products.

ENGAGED also has to consider such activities to foster the uptake of results and create a living community.

4.4.4 Strategic Dissemination Efforts

Disseminating project results, intermediate activities and future efforts to decision makers within Europe is another important factor considered in many Action Plans. Facilitating the distribution of information on a high level is a factor that may have a serious impact on the long-term success of developed solutions. Having support by federal or European governments is something ENGAGED should strive for.

4.4.5 Stakeholder Involvement

All Action Groups have tasks associated to involving all stakeholders in the particular areas. This is good practice in all research and networking initiatives and a strong point in the current Workshop and Roadmap strategy of ENGAGED. It has to be ensured that this is followed throughout the project runtime.

4.4.6 Standardization

An important aspect of initiatives associated to consolidating results from various sources is striving to create some industry standard that helps in building confidence and fostering the uptake in the specific markets. All Action Groups do follow certain routines to achieve this goal.

Consequently standardization of results is an important point that should be considered in both ENGAGED workshops and roadmap.

5 Workshop Summary Template

This section describes the workshop summary template by presenting notes on how the different items of the template should be filled. An empty version of the actual template is appended as annex to this document, so it can be easily copied and printed. Explanations are indicated by using cursive font. The exemplary information provided is using the regular font that should be used in the final version.

While we would like to keep the workshops as open as possible there are some limitations and prerequisites regarding specific points that have to be discussed in order to create a feasible roadmap:

- Regarding each agenda item, the minute taker should identify links to the roadmap
- There should be a short roadmap discussion agenda item on all workshop agendas. The expected duration is approximately 10 minutes and it should discuss the questions given in the template

General Information

Workshop Title	<i>Title of the workshop, e.g.</i> Mutual Learning workshop on Innovative Procurement
Moderator	<i>Name of the main moderator, e.g.</i> Francesco Molinari
Location	<i>Location including address, city, country and room, e.g.</i> Room 073 Fraunhofer IGD Fraunhoferstr. 5 64283 Darmstadt Germany
Date	<i>Date in the format below</i> 04.09.2013
Time	<i>Starting time and end time in the following format</i> 14:00-16:30
Minute Taker	<i>Name of the minute taker or takers, e.g.</i> John Doe
Participants	• Name, Affiliation

Workshop Overview

Outline	<p><i>In this section a short outline of the workshop should be provided, e.g.:</i></p> <p>Sharing (illustration) of models and approaches of innovative procurement chosen from experiences gained among partners (selected cases through the questionnaire on innovative Procurement), stressing weaknesses and strengths characterizing them.</p> <p>Possible insights to explore: Which different types of innovative procurement are incorporated? Which aspects / situations can affect (positively and / or negatively) the innovative procurement process? Explore this from the perspective of the supply and demand side. Which are the relationships between the innovative procurement and</p>
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	<p>the "user empowerment"? Explore the role of the living labs and its contribution to procurement. Are there active procurers in living labs involved?</p> <p>How to raise awareness on innovative procurement? Explore the use of joint collaboration models.</p>
Objectives	<p><i>In this box a short overview of the workshop objectives should be given, e.g.</i></p> <p>Raise awareness of the use of instruments of public procurement for the acquisition of innovative services and products for independent living and integrated care; Allow mutual learning and sharing practices among mature professionals and interested stakeholders for the benefit of potential new users of the instruments; Verify the possibility of integration of the innovative procurement with other innovative approaches, in particular with the Living Labs one; Analyze innovative procurement tools currently in use and identify their diversity and specificity.</p>
Expected Outcome	<p><i>This box should describe the expected outcomes of the workshop as a whole, e.g.:</i></p> <p>A publication containing the results of the workshop with its recommendations (functional for the implementation of the Guidelines). First ideas also about how to communicate the guidelines on Innovative procurement. How to transfer these insights and approaches to other regions?</p>

Workshop Agenda

Time	Agenda Item
00:00-00:00	Introduction
00:00-00:00	Item 1
00:00-00:00	Item 2
...	...
00:00-00:00	Item n
00:00-00:00	Roadmap Input
00:00-00:00	Closing

Agenda Item Protocol

Item n (example item)

Agenda Item Name	Introduction
Speaker/Moderator	John Doe
Time	15:14-15:21
Notes	Organizational aspects of the Track Introduction to Call 3

	Motivation of Track
Summary	The short summary
Identified Links to Roadmap Streams and Items	Which streams and items are affected by the discussion within this session

Roadmap Input Protocol

Speaker/Moderator	John Doe
Time	15:14-15:21
What streams have been discussed in this workshop?	<ul style="list-style-type: none"> • Stream name 1 • Stream name 5 • ...
Are there any streams to add?	If yes please outline what is the name of the stream, give a short description, describe current state and desired states and name potential items
Are there any streams to remove completely?	If yes please name stream and give reason for removal
Are there modifications to any stream?	Please only answer yes if this refers to name, description or states
Are there new items to add?	If yes outline item, start time, duration and stream to add to
Are there items to remove or modify?	If yes name item and stream and give reason and type of modification (name, start time, duration)
Are there any changes to the milestones?	Add, remove or modify. If yes give reason.
Are there any comments regarding the structure of the roadmap?	Collect any comments here

6 Conclusion

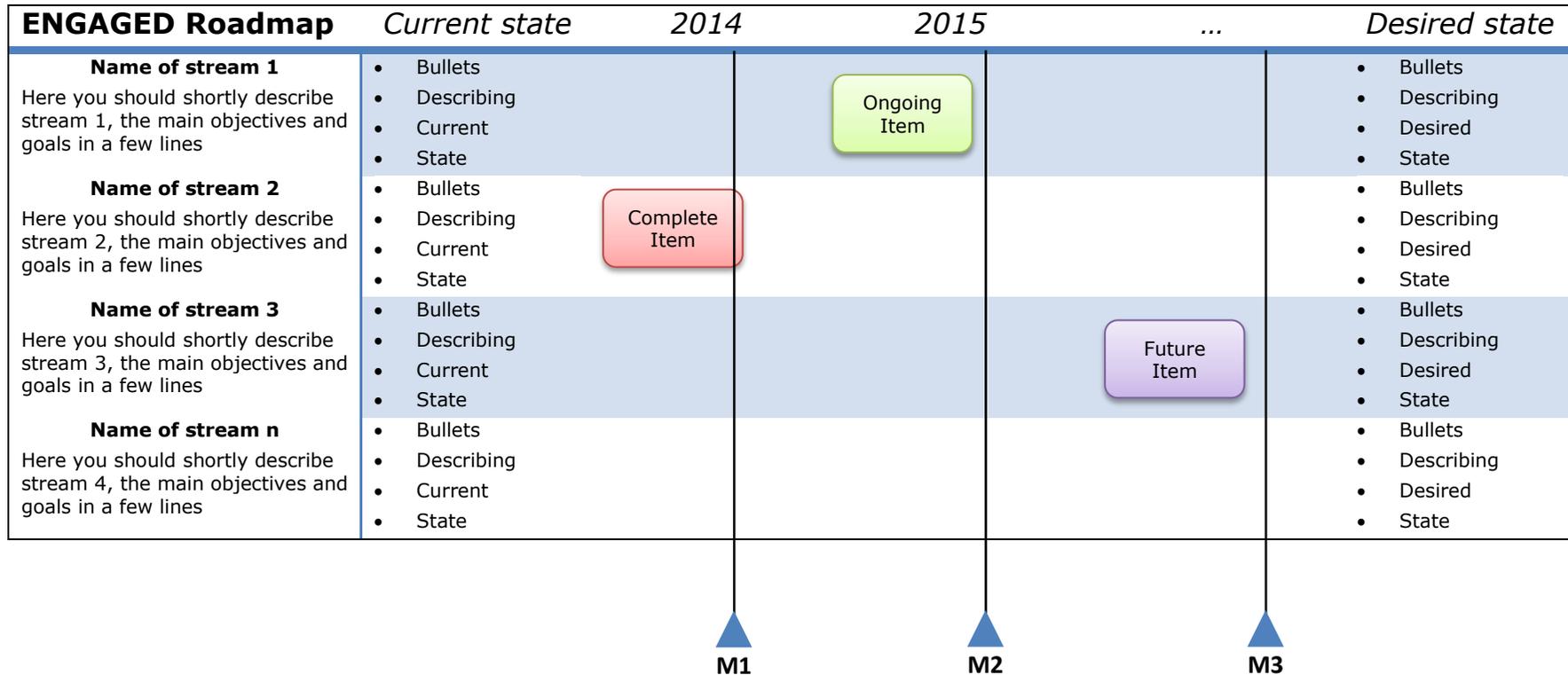
The document has given an overview of the rationale for the structure of the ENGAGED roadmap, using best practices by third party sources. The roadmap template has been described in detail, particularly concerning the creation of different streams and items and properly defining the current and desired states.

The Action Plans of the different Action Groups within EIP AHA have been summarised in order to provide input to the ENGAGED roadmap. Various structural considerations have been given and different topical items have been discussed that may be used as input to the agenda of different ENGAGED workshops.

Templates for both workshop agenda and minutes have been introduced. They are specifically tailored to simplify collecting the input relevant to the future roadmaps. The document provides indications on how to fill the templates, by giving detailed examples on all relevant parts and sections. Of particular interest are the “identified links” on all agenda items and the session on “roadmap input protocol”. The blank templates can be found in two different annexes.

This document is the foundation and guideline for all future work performed within WP4. The procedures and templates provided in this document will be refined by careful analysis and usage in an iterative process spanning the work package duration.

Appendix A - Structural roadmap template



Appendix B - Workshop summary template

General Information

Workshop Title	
Moderator	
Location	
Date	
Time	
Minute Taker	
Participants	

Workshop Overview

Outline	
Objectives	
Expected Outcome	

Workshop Agenda

Time	Agenda Item
00:00-00:00	Introduction
00:00-00:00	Item 1
00:00-00:00	Item 2
...	...
00:00-00:00	Item n
00:00-00:00	Roadmap Input
00:00-00:00	Closing

Agenda Item Protocol

Item n

Agenda Item Name	
Speaker/Moderator	
Time	
Notes	
Summary	
Identified Links to Roadmap Streams and Items	

Roadmap Input Protocol

Speaker/Moderator	
Time	
What streams have been discussed in this workshop?	
Are there any streams to add?	
Are there any streams to remove completely?	
Are there modifications to any stream?	
Are there new items to add?	
Are there items to remove or modify?	
Are there any changes to the milestones?	
Are there any comments regarding the structure of the roadmap?	