

## DELIVERABLE

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D4.3 . Participatory method to involve end-users (older people): In co-production of AFE solutions by LRAs and older people, to be used for future Covenant

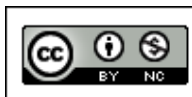
### GUIDELINES FOR CO-PRODUCING AGE FRIENDLY ENVIRONMENTS WITH OLDER PEOPLE

**Revision:** Final version

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## 1. Introduction

### Why this guide?

Demographic change pushes Local and Regional Authorities (LRAs) to adapt their cities, communities and regions to the needs of the ageing population and to identify ways to help people to live independently and actively for longer. Isolation and loneliness are often factors that strongly influence the welfare of the older population, whose cause may be due to different factors such as, among others, chronic disease, difficulty in moving independently and auditory or visual difficulties. Also, caring for dependent older people may have an adverse effect on the quality of life and wellbeing of relatives and informal caregivers of our seniors (Garcés & Ródenas, 2012). In this framework, it is necessary for a city to meet certain conditions to be an accessible city, such as, physical conditions as suitable sidewalks and pedestrian streets to facilitate the movement of people with disabilities (e.g. wheelchairs) and participative councils with older people. In this sense, some concrete examples are described in the section 4 %Good practices+. This is the time for policy makers to create Age-Friendly Environments:

LRAs need to create **Age-Friendly Environments (AFE)** that empower people to:

- ✓ age in better physical and mental health,
- ✓ actively participation in society, and
- ✓ stay independent and in good health for longer

According to the World Health Organisation (WHO, 2007) age-friendly cities, policies, services, settings and structures **support and enable people to age actively** by:

- ✓ recognising the wide range of capacities and resources among older people;
- ✓ anticipating and responding flexibly to ageing-related needs and preferences;
- ✓ respecting their decisions and lifestyle choices;
- ✓ protecting those who are most vulnerable; and
- ✓ promoting their inclusion in and contribution to all areas of community life.

**One way to ensure that our cities, communities and regions are age-friendly and meet the needs of the ageing population is to strengthen the involvement of older citizens and relevant stakeholders in the development of ageing policies. Together with policy makers, citizens should co-produce the policies that affect them** as it is recommended by the *Global Age-friendly Cities Guide* published by the World Health Organisation (WHO, 2007). This guide considers a total of eight topics, known as **the 8 petals**, to give a comprehensive picture of the city's age-friendliness: (i) transportation; (ii) housing; (iii) social participation; (iv) respect and social inclusion; (v) civic participation and employment; (vi) communication and information; (vii) community support and health services; and (viii) outdoor spaces and buildings.

Through **co-production**:

- decision-makers can use the knowledge and experience of older people in the formulation of policies for the benefit of the community as a whole;
- services are adapted to the real needs and expectations of the population;
- citizens really feel that they are part of decision making at local level; and
- older people and older people's organisations feel supported, listened and respected.

On the framework of the **Project AFE-INNOVNET "Thematic Network Innovation for age-friendly environments in the European Union"** funded by the Competitiveness and Innovation framework Programme (grant agreement: 620978), this manual wants to provide **LRAs with a practical guide on how to co-produce AFE with older people and relevant stakeholders, using a participatory methodology**. It is the

*D.4.3. Participatory method to involve end-users (older people): in co-production of AFE solutions by LRAs and older people* result of the WP4 Support evaluation of innovation for AFE lead by Polibienestar Research Institute at the University of Valencia, supported by Age Platform, CEMR, Eurohealthnet, Netwell Centre, and Alzheimer Europe; and with the collaboration of all the regions and municipalities<sup>1</sup> involved in the project.

The guide provides background information on relevant definitions and concepts and a step-by-step guide on how to co-produce age-friendly solutions in partnership. It uses as its main frame of reference the work carried out by the WHO and the Global Network of Age-Friendly Cities and Communities. It builds on a literature review and the expertise of the 29 partners of the AFE-INNOVNET project and the members of the Thematic Network AFE-INNOVNET in the field of ageing and co-production methodologies. Moreover, the guide benefits from the knowledge and expertise of the D4 action group on AFE of the European Innovation Partnership on Active and Healthy Ageing (EIP AHA).

### **Who should use these guidelines?**

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This guide targets LRAs but it can also be used by other stakeholders (professionals, voluntary organisations, older people associations, etc.) committed to involving older citizens in their decision-making processes and allowing them to contribute to the creation of AFE.

### **How should this guide be used?**

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After an introduction containing background information, readers will find a step-by-step guide on how to design, implement, monitor and assess age-friendly policies, strategies, and initiatives in partnership with older citizens and relevant stakeholders.

The guide will provide the reader with practical tips on:

- identifying and tackling the opportunities and **challenges** that a co-production process can bring about;
- **planning** and **coordinating** a co-production process;
- recognising the main **tools** that can be used to allow the citizens participation in the policy-making process;
- **preparing working sessions** with citizens and stakeholders; and
- helping to develop a **real needs assessment**.

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<sup>1</sup> Louth County Region (Ireland), Friuli Venezia Giulia Region (Italy), Older Peoples Commissioner for Wales (Wales); Manchester City (UK), University Medical Center Groningen mandated by Groningen City (The Netherlands), Tampere City (Finland), Stockholm City (Sweden), Bruxelles City (Belgium), Warsaw City (Poland), Ljubljana City (Slovenia), Franche-Comté Region (France), Krakow City (Poland), Fredericia City (Denmark), Association of Flemish Cities and Municipalities (Belgium), Kuldiga City (Latvia), Institute for Microelectronics and Microsystems mandated by Puglia Region (Italy), Celje City (Slovenia), Tallin City (Estonia), and Porto Social Foundation mandated by the city of Porto (Portugal).

## 2. Background information

### What do we mean by a co-production process?

By a **co-production** process, we mean a partnership between LRAs, older people and older people's organisations, working together to design and deliver opportunities, support and services that improve wellbeing and quality of life (Sanderson & NDTI, 2009).

A co-production process to build AFE facilitates the **exchange** of information between LRAs and older people and develops age-friendly communities. By doing so, older **citizens** are considered **as active actors of change** with the skills to contribute to the development of innovative solutions to demographic change and with the ability to assume a leadership role in the process and in the decision-making process. In summary (Boyle & Harris, 2009):

- ✓ It means delivering public services in an **equal and reciprocal relationship** between LRAs, professionals, services users, their families, neighbours and people close to them. Where activities are co-produced in this way, the services and communities become far **more effective agents of change**.
- ✗ It is **not synonymous with mere consultation**. It is not only about asking for people's opinions before handing the service back to the professionals to deliver, or to validate the choices made: it is about involving people in the design and delivery processes as well.

Some of the professionals who may be involved in this process are for example: architects, engineers, business management, psychologist, social workers, sociologist, journalist, occupational therapist, gerontologist, designers and/or engineering in tourism. The profile that can be involved may vary depending on the AFE solution we want to co-produce, a representation of all stakeholders is recommended.

### What are the principles of the co-production methodology?

The **seven principles** that are the basis of the co-production methodology are (Sanderson & NDTI, 2009) as follows:

1. Older people are involved in the entire process from beginning to end.
2. Older people feel safe to speak and to be heard.
3. Issues which are relevant to older people are addressed.
4. The decision making process is clear.
5. The skills and experience of older people are involved in the process of change.
6. The meetings, materials and infrastructure are accessible to older people.
7. Progress is evaluated by asking to them the real changes in the lives of older people.

### What are the advantages and challenges of co-producing policies and initiatives?

Co-production methodologies have several advantages (AGE Platform Europe, 2010)

#### Older people as active citizens (end-users):

- Older people feel heard and recognised as peer in the discussion;
- The self-esteem of older people is strengthened and increased;
- The needs and demands of older people are better understood and taken into account;
- The image associated to older people is improved and new partnerships and linkages among age groups are created; and



- The co-production process helps prevent older people's social exclusion

**Policy makers can take better decisions on AFE:**

- They can benefit from the knowledge experience and potential of older people;
- They can better understand the needs of older people;
- They can adjust policies and strategies to the needs of the citizens at different ages; and
- They can build a broad consensus and achieve long-term support for their reforms;

In this framework, its particularly important consider sustainability challenges (not only financial), which requires analytical and normative input from diverse actors in an interactive components such as debate, dialogue, joint inquiry, negotiation and mediation (Talwar, Wiek, & Robinson, 2011). The **challenges** for these target groups (i.e. older people and policy makers) are summarised in Table 1 below:

**Table 1: Challenges for older people (end users) and policy makers of using participative co-production for these target groups**

Older people (end users)	Policy makers
<p>Some may feel unheard or not at ease expressing themselves.</p> <p>Some may have difficulties in identifying their needs.</p> <p>They may be unaware of the knowledge that they can provide to policy makers and feel discouraged from participating.</p> <p>They might face challenges in participating due to physical and/or psychological constrains (e.g. loss of hearing or eyesight, memory loss, mobility problems).</p> <p>They don't have these opportunities in most places . or not information about these opportunities.</p>	<p>Engaging older people to participate, being clear that their participation is valuable during the process.</p> <p>Offering a safe environment which allows discussions with participants and moderating the discussions with older citizens.</p> <p>Identifying older participants, particularly, those who are socially isolated.</p> <p>Facilitating participation and considering special measures for people with physical and/or cognitive impairments.</p> <p>From the organisation, facilitating participation for those who still work to attend.</p>
<p>They may feel that they are too old to learn about ICT and lack interest in learning.</p>	<p>Developing training programs to include, among other topics, learning ICT as a means to avoid marginalization resulting from the technological advances of modern societies.</p>

This guide provides practical tips on how to benefit from the advantages and overcome the challenges linked to the co-production process.

### 3. Co-production in practice: a guide for LRAs

#### BEFORE STARTING

##### What are my objectives?

First of all, it is necessary to define the objectives you want to achieve through the co-decision process. Once you have set them, you can also ask you a set of practical questions to help you plan the process:

- Why now?
- Who will benefit from the initiative and who should be involved in the process?
- What kind of knowledge and experience would they bring
- What financial and human resources are available?
- What infrastructure can be used? Is there already?
- How can we build on existing resources?

The answers to these questions will help you later to communicate your initiative internally and externally.

##### Who is responsible for the process?

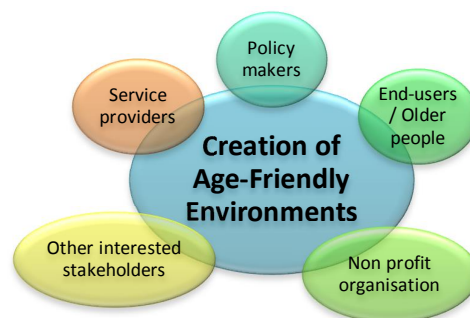
It is necessary to identify the **team** which will participate in the process and define the roles and responsibilities of each member. Depending on the AFE initiative you may have to consider different roles, but the roles below should be in any case is foreseen:

- **Coordinator/facilitator:** person who coordinates and supervises the process by defining the objectives of the initiative, roles and responsibilities.
- **Ethical advisor/ contact point:** person in charge of the recruitment of older citizens and other stakeholders and responsible for guaranteeing the ethical aspects throughout the process.
- **Administrative officer:** person who deals with reimbursements, manage meeting places, administer the attendance, preparation of certificates, logistic tasks, etc.
- **Communication officers:** people who can facilitate the contact with citizens / end-users in the recruitment phase and later in the dissemination of the results.
- **Policy makers:** they should be aware of the decisions that are taken during the process and implement them.
- **Technical officers:** people who are responsible for monitoring the whole process, to evaluating the results and the achievement of the defined objectives, and disseminating the conclusions.

According to the resources available, a member of the team can play multiple roles.

##### Who should I involve?

In order to effectively work in **partnership**, all relevant stakeholders need to be involved in all phases of the process from the very beginning: policy makers (e.g.: state representatives, national and local politicians), service providers (i.e.: day centres, hospitals), older people (i.e.: seniors associations), their formal and informal carers, non-profit organisations (i.e.: charities,



foundations), other interested stakeholders (i.e.: SMEs, business, families, neighbourhoods, research/academia).

Once you have clarified the objectives of the co-production process you can identify who should participate and how, by using the following analysis described in the Table 2:

**Table 2: Analysis for identifying participants for the co-production process**

<p>Write a list of all the people and groups affected by the AFE initiative.</p> <p><i>Example: Your municipality is planning to offer a service that provides meals for older people living at home. The people involved in this new service include: older people living at home, their families, formal caregivers, service providers (companies of catering and transportation and restaurants, etc.</i></p>	<p>Write why you need the help of older citizens and other relevant stakeholders.</p> <p><i>Example: You want to know if the new service will be accepted by older people and their families, how they want to receive the service and which SMEs in the city are interested in providing the service, etc.</i></p>
<p>Use a chart to plan activities with the identified people and groups.</p> <p><i>Example: You can organise focus groups or carry out a brief survey to receive the feedback of the identified stakeholders and users.</i></p>	<p>Use a chart to discuss when you need the contribution everybody..</p> <p><i>Example: You want their contribution just for the design of the new service after a month from its implementation.</i></p>

### **What are the ethical issues to be considered?**

One of the tasks is to ensure that participants have a full understanding of the purpose and methods to be used, the risks involved, and the demands placed upon them as a participant, understanding that they have the right to withdraw from the process at any time (Drew, Hardman, & Hosp, 2008). In this sense, the promotion of an ethical decision-making process should be a central strategy in all programmes, practices, policies and research on ageing (WHO, 2002). For this reason, it is important that older people are **fully informed about the objectives of the initiative, how it will work and why they have been invited to participate**. Freedom to withdraw from the process at any time should be guaranteed.

An **informed consent** form should include information such as the name of organisation that holds in charge of the activities, information about the process (a brief introduction and details about the objectives, participant selection, voluntary participation, methods, duration, risks, benefits, reimbursements, confidentiality and contact person) which the person must sign if he/she accepts to participate in the process. The World Health Organisation has created an *Informed Consent Form Template for Qualitative Studies which* (see Annex I). However the document you use should ideally be shorter and clearer. It is also very important that the organisers try to ensure that the person has the capacity to consent or to clearly establish in the document the faculties should be the person to participate in the process.

Considering the issues that have been exposed, could be very useful to create a forum for dialogue to discuss these aspects, to clarify the objectives of the work plan and go beyond the informed consent.

### What are the potential risks?

The coordinator of the process should identify potential risks that may occur during the process and their potential solutions. In Table 3 below you can see some potential risks and possible solutions:

**Table 3: Potential risks and solutions in the co-production process**

Potential risk	Possible solution
Withdrawal of participants	Be aware of the high risk of withdrawals and adopt a strategy that ensures sufficient stakeholders participation in the process.
Frustration	One of the biggest frustrations for participants is often that their involvement does not seem to lead to service improvement manage participants expectations and provide them with a feedback on their contribution.
Lack of representativeness of the people involved	Pay attention to this in the recruitment phase considering a method of selection and recruitment that ensures reach the largest possible number of the target population and on the basis of this population, choose a representative sample.
Inaccessible communication, materials and meeting places	Specific attention should be paid to the needs of frail people, and those with poor social contacts, in order to facilitate their participation.
Lack of security in the meeting places	Specific attention should be paid to the security of older people in the places where they are invited to participate.
Lack of interest	It is important that participants understand the benefits of a participating in the process. Specific attention has to be paid to the communication material.
Communication	The language we use to communicate with the target group need to be simple and adequate. Specific attention has to be paid to the accessibility of the communication channels as well.
Communication difficulties	Coordinators and end-users should be able to understand each other. It is therefore important to ensure that they are using a common language. The coordinator should begin each session by explaining key concepts and terms used, or that they might not be familiar with (and remind participants whenever necessary). This allows a better participation in the meeting.
Lack of participation in the evaluation phases	It is therefore important to make participants understand the benefits of their participation right up to the end of the process and not just at the beginning.
Lack of time of participants	Ensure that meetings are made in a convenient time for participants and are not extensive.

## What resources are needed?

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The resources needed to develop this methodology are mainly **time, staff, and budget**.

- ✓ **Human resources:** the team (roles) were defined previously. It is necessary to work with people who have good communication skills and are able to empower older people in public speaking and to motivate older people to participate in the process. It is important that staff have good communication skills to enable them to communicate with and motivate older people to participate in the process. The issue of building the capacity of people who have not engaged in similar processes previously should not be underestimated.
- ✓ **Financial resources:** it is important to consider the costs which may be incurred by citizens while participating. Citizens are often encouraged to participate voluntarily on the understanding that their basic expenses are covered. However, citizens should not have to pay any extra fees for their participation in the work sessions. Whether there will be compensation or not, travel expenses (e.g. travel, hotel and transfers to the venue) should be covered when necessary. Also you may consider small gifts and certificates of recognition or organise a social event to show your appreciation of the user engagement. The opportunity to learn or practice some skills can also be an important reward. It is necessary to estimate the activities to be undertaken in each session in order to anticipate various costs (e.g. coffee breaks or lunches, printed documents, materials, equipment, recording, etc. Even if a website or ICT tool is used, the maintenance of the equipment represents a cost which should also be considered in advance.
- ✓ **Time schedules:** *It is necessary to consider the time needed:*
  - To recruit people (for the actual participation and the evaluation of the outcomes and the follow-up).
  - To develop a trusted and relaxed atmosphere.
  - To listen to what people have to say enable them to participate in the planning and management development during the work sessions and ensure that participants feel comfortable making a contribution.
  - To monitor and evaluate the results.
  - Finally, to disseminate the results among participants and interested agents and to thank participants for their collaboration.

NB: Participants have to represent the diversity and heterogeneity of the population. For those of them with physical or cognitive impairments, breaks should be considered more frequently. It is also advisable to plan wrap-up sessions to remind participants about what was said during the session. It is necessary to emphasize the benefits it means to them participation in these activities, which can be used as an instrument to contribute to respect for the older people and have higher and better levels of representation as against the authorities. Change this passive and isolated attitude to a proactive and protagonist attitude, intervening in the development of their nearest and senses areas, in a local level, population or older people sector (Valladares, Pino, & Vásquez, 2007).

## How can new technologies facilitate the co-production process?

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New technologies have enabled new forms of collaboration between different professionals and citizens. This relationship will continue to evolve, making users / citizens less dependent while giving them more responsibility (Löffler, 2009). New technologies, especially the Internet, can help LRAs build relationships and communicate in real time with end-users / citizens and other stakeholders. ICT can

contribute to the process of decision making of policy makers on new policies or programs, in particular through the use of simulation tools (Orduña et al., 2013). Indeed, new technologies have the following **benefits for older people** (Pavón & Castellanos, 2000):

- Facilitating easy access to information;
- Facilitating concentration and attention;
- Promoting life-long learning;
- Improving communication;
- Facilitating social participation; and
- Stimulating memory and creativity.

Despite the benefits of new technologies, many older people are still reluctant to use new technologies. Even though the use of ICT by older people is increasing, and there is still a significant age-based digital divide (Czaja & Lee, 2007) or do not have access to ICTs. It is necessary to find ways to bring them closer to ICT (e.g. through training and public spaces where new technologies are freely available, etc.), to help them appreciate what technology can do for them, to tune in to their interests and expectations and to design programmes around their needs (Independent Age, 2010).

In the practical part of the guide, we will highlight how new technologies can make the co-production process easier and faster. However, the issue of some older people not having access to ICT needs to be more fully addressed. It is not only access to the internet but the inability or unwillingness to use it. This should also be addressed. Some people simply will not be able to learn how to use new technology and we have to respect that and look for alternatives how to work with them anyway.

### **Define your Communication Strategy**

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Planning your communication strategy and make sure that your language and communication channels are accessible for your target groups are a key step of the co-production process. You need to clarify the following:

- What is my goal?
- What are my objectives?
- Who are my target groups?
- What is the message I want to communicate?
- What communication channels would be most effective to reach the target group?
- What budget do I have for communication?

Once, you have answered the previous questions you need to plan how you are going to communicate with older people and relevant stakeholders and how are you going to engage them. Here are some **tips** for the development of a communication strategy (Age Platform Europe, 2014):

**Table 4: Tips for developing a communication strategy with older people**

Foresee small groups for the discussions.	Try to create an informal atmosphere to make participants feel comfortable and relaxed.
Good moderation can enhance the motivation and dynamic of the group, avoid conflicts and ensure focused discussions.	Some people need encouragement and guidance to say what they want. They need to feel that they are in a safe environment (e.g. in terms of confidentiality and trust)
Try to avoid tension and conflicts and	Pay attention to your non-verbal

foresee procedures for the resolution of conflicts.	behaviour, such as gestures, body posture, and attitude (for example being ironic).
Try to maintain eye contact as it may compensate for poor hearing.	Use open-ended but simple questions.
Repeat when necessary.	Give time for questions.
Use clear language.	Avoid jargon and acronyms.
If possible, use the same language or dialect of the audience.	Using locals as interpreters but also as contact persons with seniors can facilitate engagement and build trust among the participants.
Provide accessible information: large and clear characters in printed materials and presentations.	Use flipcharts, cameras and other simple tools to facilitate the discussion and where necessary to aid memory.

A **first meeting** with citizens and stakeholders is necessary to communicate the objectives of the initiative and listen to the expectations of all those involved in the process. The first meeting should help to establish a relationship of trust and equality among participants and to build genuine partnerships. Moreover, **regular meetings** with citizens and stakeholders should also be envisaged to monitor the interim results of the process and the feedback of those involved.

The International Development Research Centre (IDRC) and the Swiss Agency for Development and Cooperation (SDC) (2008) suggest a model for the development of a communication strategy (see Annex II).

## IMPLEMENTATION

### Recruit your target groups

Below you will find some strategies to recruit citizens and stakeholders and engage them in the whole process (Nedopil, Schaubert, & Glende, 2013):

- É Build relationships with older people's networks and groups.
- É Post adverts in newspapers and on the radio or local TV.
- É Advertise (e.g. flyers and posters) in public places such as libraries, health, centres, churches and community centres, etc.
- É Recruit people personally in public places.
- É Visit intermediaries (e.g. senior clubs and sport clubs, old people homes).
- É Collaborate with social services.

In order to reach your audience, it is important to use **different channels**. Users and stakeholder are a very heterogeneous group. Therefore, it is important to use different channels to reach them all. There are for example, potential participants who regularly use email and others who mainly use local newspapers to inform themselves about the news. Contacting civil society organisations representing older people is also a practical way to reach a wide number of them. You can also seek support from informal networks or alliances in direct contact with older people and/ or join forces with other stakeholders (service providers, police, industry, business and educational bodies, etc.). However, it is important to ensure that you also involving vulnerable and isolated people in order to have a representative group.

It is necessary to recruit at least *twenty percent* more participants than actually needed in case of withdrawals, but try to take measures to ensure that those who withdraw are not all from the same group (e.g. those who are socially excluded).

When you recruit, you should:

- ✓ Pay attention to the representativeness of the people involved;
- ✓ Be aware of the high possibility of withdrawals and adopt a strategy to ensure sufficient participation of citizens during the whole process;
- ✓ Inform citizens in accessible language about the basic aims of the project;
- ✓ Enable citizens to understand how they can benefit from their engagement; and
- ✓ Give citizens the sense that their participation is valued and necessary.

In the recruitment process you may face several challenges. These and some potential solutions are described in Table 5 below.

**Table 5: Challenges and solutions in the recruitment process**

Challenges	Potential solutions
Participants are not representative of the target group.	Choose different channels to recruit people and ensures the representativeness of the population. This issue could be monitoring considering some characteristics of participants (e.g. age, gender, education, health status, residence/geographical provenance, status as service-users/non-users, etc.)
People do not all participate actively	Create an environment of trust and respect where people feel they can give their opinion
People do not attend all the meetings	Organise meetings in a way that people feel motivated to attend and participate, considerer previously problems with the transport, mobility, care responsibilities, insufficient information about the time and venue, among others reason for not participate.
It is difficult to achieve commitment from the people involved	Citizens must feel that their contributions are an essential part of the process

### **Select the appropriate tools to involve older people in the process**

The choice of co-production tool will vary according to the objectives, participants time and budget available. Please find below an overview of possible **traditional tools** that the European project INNOVAGE has identified (Age Platform Europe, 2014):

Focus groups use a selected group of people that can be asked about their opinion on a particular topic. There discussion points are raised in an interactive group and participants are encouraged to talk freely (6-8 people maximum). Among the advantages to use this tool, we can highlight the following: bottom-up approach, generation of reaction and input from individuals, and direct communication between the users and the promoters of the AFE initiative, policy or strategy. However, it requires much effort in terms of planning and effective time keeping, some participants might have difficulties to understanding their role and the scope of the focus groups and some participants might be reluctant to contribute or find it difficult to share their



point of view. Below you can find some tips to the successful development of the focus groups:

- Use plain language and formulate questions that are easy to understand.
- Keep the agenda simple.
- Ensure a common understanding of the terminology in use.
- Take care of practical issues (e.g. accessibility, hearing and vision impairments).
- Provide opportunities and time for effective discussions.
- Provide opportunities for feedback from all participants.
- Ensure feedback to participants.

Workshops are composed of small groups that meet to explore a subject and provide input or feedback, based on interaction and exchange of experiences and information. The advantages of using this tool are: views of participants with varying background and expertise, and different perspectives, competences and experiences. Among the challenges: facilitating the discussion and summarising the results to reach general conclusions or consensus, language, equal participation of all relevant stakeholders is difficult to ensure, and discussions can take more time than expected. If you decide to use this tool, these are some tips that can help you:

- Involve users in the planning of the event from the beginning.
- Make sure that you are reaching an equal number of all relevant groups.
- Foresee discussion groups, questionnaires or other tools that can help participants express their points of view.
- Foresee an evaluation form to receive a feedback from participants.
- Research useful methodologies such as *conversation café*

User or stakeholder fora provide space for dialogue with users or between stakeholders about specific topics. It is a concrete way to test ideas and normally gather together representatives of user organisations and/or users themselves. However, discussions may be quite wide in their content and keeping to the planned schedule might become difficult, the participation of stakeholders from very diverse backgrounds can hinder the process, and the elaboration of the results and organisers should ensure that attendees have a common understanding of the terminology in use. Here you have some practical items to be considered if you use this tool:

- Plan in detail the forum, paying attention to logistics, the definition of the agenda and the follow-up of the event.
- A brief description of an event or a situation can facilitate the understanding of users and clarify the purpose of the forum.
- Can be combined with other methods, like individual interviews.
- Provide definitions of key terms.

Advisory board is a group of individuals, normally experts selected from organisations of users that make sure the most relevant person sits in the group, who have been selected to provide advice on a particular topic, in this case, on the AFE initiative, strategy or policy. They provide specific expertise, they enable a long-lasting contribution because generally they are consulted along the whole project development and they give visibility to the project. As the group can be composed by experts from different countries, a common understanding of the terminology should be established and also time should be given to them prior to the meeting so they can get prepared about the issues to be discussed.

**Other tools** that you can use:

User Panels are regular meetings of citizens to discuss specific topics. They can help to identify the concerns and priorities of the AFE initiative and can lead to the early

identification of barriers to its development and implementation. Older people who participate seem to enjoy them. They feel that they are making a contribution but when the number of members is small they are likely to receive less interest or credibility. A disadvantage is that user panels are expensive to run and they need constant maintenance (Carter & Beresford, 2000).

Service prototyping is a tool for testing the service by observing the interaction of the user with a prototype put in the place, situation and condition where the service will actually exist (Saffer, 2007). The purpose of this method is to analyse the interaction between end-users/citizens and the new service, policy or strategy that want to be implemented and the impact on the user perception and experience. Service prototyping can be used in all stages of the co-design process but is especially valuable in the ideation phase (Gray et al., 2014).

3H: Head, Heart, Hands-on; this is an open living lab methodology that has been specifically developed for the European CIP iCity project<sup>2</sup>. It uses the human body to describe a step-by-step user driven innovation process:

1. Head: identifying and mapping the actors of the community innovation system to provide protocols and tools to collect and understand the needs and barriers.
2. Heart: consolidating all the relationships necessary to establish trust and commitment between all the stakeholders.
3. Hands-on: engaging the participants in the co-creation and development activity in itself. This final part includes an evaluation activity based on a client-driven set of indicators.

The LUPI (Innovative Use and Practices Laboratory) is a user-centred co-creation tool conceived in the Cité du design (Gray et al., 2014). Its added value is its flexibility as well as its short duration (three to six months) with three phases:

1. Framing the issue (1 day): Partners share their issues and clarify them collectively, the ideas are refined, a particular investigation track is chosen, and a typology of users/citizens is defined.
2. On-site observations (3 ½ days): partners are trained by the designers to capture and synthesize "hidden insights" during user interviews.
3. Sharing (1 day): partners present the collected insights from the on-site observations and interviews. After the presentations, an ideation phase enables the new ideas to be mapped with the help of the designers. Particular attention is given to concepts with strong strategic elements that may lead to sustainable business models.

HUMBLES (Aragall & Montana, 2012) is a human-centred methodology derived from its seven iterative steps:

1. Highlight Design for All opportunities
2. User identification
3. Monitor interaction
4. Breakthrough options
5. Lay out solutions
6. Efficient communication
7. Success evaluation

HUMBLES is quite effective on a quantitative level, because it is mainly based on surveys. Although the HUMBLES method is mainly focused on shaping the companies' strategies by human diversity and users expectations, the methodology can be used by LRAs to implement design for all in the new AFE initiative, strategy or policy.

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<sup>2</sup> <http://www.icityproject.eu/>

Photovoice is a qualitative research technique in which participants record and reflect their community through photography. It has been proved an effective tool for eliciting older citizens' perceptions of their communities, giving voice to their concerns and identifying strategies for change. Nevertheless, there are a number of challenges to overcome including training in photography (Novek, Morris-Oswald & Menec, 2012).

Public participatory GIS methods capture citizens' values, preferences, experiences and other social variables in an explicit geographical space. With this method, you can visualize citizens' feedback on a digital map, compare groups and analyse the data from a spatial perspective (neighbourhoods, streets, etc.). This method requires some technological knowhow from you and from stakeholders participating in the process as the data may be included on online platforms. Another possibility is that participants complete their feedback on paper maps and then you transfer the information to the online platform.

In this sense, it is important to mention 11 methods described by the Ambient Assisted Living Joint Programme for user integration in projects funded by this programme (Nedopil et al., 2013):

1. Brainwriting (sometimes referred to as the Gallery method) is a creativity technique with which end-users or other stakeholders generate many concrete ideas for product functions or services.
2. Co-discovery is a usability test involving two participants, which makes the feedback more natural and lively than tests with just one participant and the thinking aloud method. Participant test the usability of a product or prototype in pairs and describe what they think about this.
3. A cognitive walkthrough is an analytical inspection method for evaluating prototypes from a user's perspective. A usability expert usually uses this method, but users or stakeholders can be included, as well. The testers take the role of a user and walk through the different steps of using the product virtually, or with the support of the product.
4. Paper prototyping is a method for testing the functionality and layout of an interface before coding it. The participants solve use cases by using paper prototypes.
5. A selection list is an evaluation method for a systematic and qualitative selection of product functions or concepts from a variety of collected ideas.
6. Self-documentation is an ethnographic methodology to identify user needs and test solutions through self-documentation (e.g. writing and photos) in the user's living/working environment over a longer period of time.
7. Shadowing is an observation technique to collect information about a person's everyday activities and natural environment. It provides insights into complex behaviours or aspects of which the observed person might not be aware.
8. A storyboard consists of simple cartoons to depict planned functions or services before actual implementation in order to determine possible weaknesses or critical acceptance issues.
9. The UTE (user, task and environment) analysis identifies basic requirements that are based on the user characteristics, the task process and environmental conditions.
10. The Walt Disney method is a creativity technique to generate realistic and new ideas for products or services from different perspectives.
11. The Wizard of Oz is a simulation technique to perform usability tests with prototypes that do not yet work independently. The system is controlled or replaced by a human operator, simulating the planned system behaviour.

Finally it is important to introduce the concept of **Living Lab**. It is a new model where all stakeholders (academia, citizens, policy makers, users' associations, etc.)

participate actively on Innovation, concretely, in the co-creation and validation of the solutions they need using ICTs and forming an ecosystem of Research and Development which permanently enables Social Innovation. The Living Labs can be used in the specification, prototyping, validation and redefinition of AFE solutions using previous tools and methods in real life environments putting together older citizens, researchers, companies and LRAs.

In the annex 8, useful documents with guidelines to develop some of the previous tools and methodologies are available.

### **Develop an action plan**

Together with the participants, you should develop an action plan containing the **major goal, objectives and activities of the process, as well as the indicators to assess the results**. The plan should also include details of the **specific tasks and responsibilities** of all those involved in the process. You can see an example of an action plan in Annex 3.

**Indicators** are ways of measuring the progress and results of your co-production methodology. They should be realistic and achievable. Here you can find some examples of indicators: number of participants involved, percentage of participants by age gender and socioeconomic status, increased use of ICT among participants, variation of self-perceived health, number of new partnerships at local/regional level, etc.

### **MONITORING**

After every activity with the citizens and stakeholders, you should measure the level of participation and the achieved objectives. You can foresee questionnaires, for example. This will help you assess your on-going Action Plan and adapt it if necessary. The monitoring process can also help you ensure a regular feedback to the involved citizens and stakeholders. It is important to provide them with the minutes/feedback of the meetings/activities with the summary of the decisions taken, reports on objectives achieved and/or progress of the process, etc. Participants can identify basic but relevant issues such as, what, where, when, why and how the tasks were carried out during the process and by whom. **Participants need to feel that their contribution has an impact** - they need feedback on how the organisation has listened to them, and what results and/or actions are being taken (AGE Platform Europe, 2014). You will find some ideas on monitoring and evaluating the meeting in Annex 4.

#### **How can new technologies facilitate this phase?**

The following online tools can help you collect data from participants; it has to be ensured that the target groups are at least dealing with them:

- ✓ Survey Monkey for the questionnaires
- ✓ Doodle to keep track of participation in meetings
- ✓ Google analytics to monitor the visits to your website
- ✓ An interactive mobile app that records very simple surveys

If your target groups are reluctant to use ICT, you can collect their feedback with paper questionnaires, personal interviews and focus groups, etc. This may be particularly important for more excluded older people.

### **EVALUATION**

The evaluation will help you to assess the results of the process: **what you have successfully achieved and what you need to improve**.

At the end of the process, you need to measure the indicators that you foresaw in the Action Plan in order to assess your results. You could also envisage surveys to collect the feedback on the experience of those involved in the process (older citizens and the other stakeholders). You might, for example, want to:

- ✓ Compare the results with the objectives and goals.
- ✓ Assess whether the plan worked as intended.
- ✓ Evaluate the effectiveness of the methods used.
- ✓ Consider whether changes were achieving.
- ✓ Evaluate the number and representativeness of people involved.
- ✓ Evaluate the equipment, costs and materials used to achieve the objectives.

A good example is offered by *Old Moat: Age-friendly Neighbourhood Report* whose information you will find in Annex 5, along a template of an evaluation report.

#### How can new technologies facilitate this phase?

- ✓ SurveyMonkey for the questionnaires
- ✓ Doodle to keep track of participation in meetings
- ✓ Google analytics to monitor the visits of our website

As stated in relation to the previous stage, if your target groups are reluctant to use ICT, you can collect their feedback by means of paper questionnaires, personal interviews and, focus groups, etc.

### DISSEMINATION

The outcomes of the evaluation and the lessons learned through the process should be promptly and clearly **communicated to the participants and community**. You can highlight:

- ✓ The lessons you have learnt (What was good? What needs to be changed or improved? Where there delays? Why? Were there detected risks?)
- ✓ The good practices you want to share with other organisations.
- ✓ The impact of the co-produced AFE (impact on the wellbeing and participation of older people, impact on the budget of the municipality/region, etc.).

There are several organisations that can help you to disseminate the results of your co-production processes to other stakeholders and at the same time provide LRAs with examples of good practice:

- AFE-INNOVNET
- CEMR
- AGE Platform Europe
- CIT-A-PE Forum
- EIP-AHA

#### How can new technologies facilitate this phase?

You can disseminate the outcomes of the co-production process through:

- ✓ Websites
- ✓ Blogs
- ✓ Twitter
- ✓ Facebook
- ✓ Google+
- ✓ Youtube
- ✓ LinkedIn
- ✓ Local papers
- ✓ Seniors associations

#### 4. Good Practices

##### ***The Dorset Age Partnership***

It is a network of older people made up of: representatives from older people's forums and groups across the county; strategic leads and lead officers from Dorset County Council; the primary care trust; the district councils; police, fire and rescue services; voluntary organisations, etc. The district/locality groups, and a majority of older people involvement, feed into the coproduction process to ensure that the strategic direction explored and set at the county level is translated into practical and tangible improvements on the ground.

<https://www.dorsetforyou.com>

##### ***FEARLESS: fear elimination as resolution for loosing Elderly's Substantial Sorrows***

Is a project designed to detect a wide range of risks with a single sensor unit, enhancing mobility and enabling elderly to take active part in the self-serve society by reducing their fears. The users are involved throughout the entire project, as their needs and wishes are examined in regular feedback intervals. It is developed with an end-user centred design and the participation of users (elderly, care-taker organizations, relatives, etc.) is crucial.

<http://www.fearless-project.eu/>

##### ***Brighton and Hove Lay Assessors***

Their role is to visit people in their own homes to talk about the home care services they receive on a day to day basis. There is a network of seven such assessors, all volunteers and members of the 60+ action group. They provide feedback to the agencies about what's working and not working from the older people's perspective.

<http://www.bh-impetus.org/projects/lay-assessors-scheme/>

##### ***Belgian Ageing Studies***

Established in the early 2000s, engages in the scientific study of the social aspects of ageing, focusing on a range of social gerontological issues, including social, cultural and political participation in old age, volunteering, inclusion and exclusion, AFE, feeling of safety and the social policy of later life. The project is a result of a close collaboration between the research team, the regional government and councils of all participating municipalities, senior advisory boards, and other stakeholders. Through a participatory method, the older people themselves are actively involved as actors in all stages of each study, playing a crucial role in the planning, the design, and the realisation of the research project, as well as in the development of local policy plans.

<http://www.belgianageingstudies.be/>

##### ***The National Council for Senior Citizens 2014-2017 (Norway)***

The National Council for Senior Citizens in Norway is an advisory body for public authorities and national institutions appointed by the Government. The council focuses on issues concerning living conditions of senior citizens and their opportunities to take part in working life and society at large.

<http://www.seniorporten.no/English/The+National+Council+for+Senior+Citizens+2014-2017.200549.cms>

### **Case Study Old Moat: Age-friendly Neighbourhood Report**

This programme of work has co-production at its heart. It draws on a range of social science, architectural and urban design approaches to investigate the development of the physical and social environment from an age-friendly perspective.

<http://www.bjf.org.uk/web/documents/page/OLD%20MOAT%20%20AGE%20FRIENDLY%20CITIES.pdf>

### **The National Association of Senior Citizens Councils (Denmark)**

Is a voluntary nationwide organisation, which consists of Senior Citizens Councils, each representing one of the 98 municipalities in Denmark and their purpose is to work as a connection between the older people and the local decision makers, by being consulted in all matters regarding older people. The idea is that the Senior Citizens Councils has to have influence on radical decisions and ways of acting in municipalities and counties on all the areas concerning older people.

<http://danske-aldreeraad.dk/english/>

### **Mobility and safe streets: older generations in movement in Rome (Italy).**

The Ministry of Transport and Infrastructure with the City Department of Transport and Mobility have promoted sessions aimed to inform senior citizens about new mobility services implemented in Rome (public transport, carpooling, car sharing and bike sharing) while encouraging critical approach on public transport and mobility issues.

<http://www.mit.gov.it/mit/site.php?p=cm&o=vd&id=3258>

### **Senior Citizens' Participatory Budget in Alfândega da Fé (Portugal).**

Senior citizens 65+ provide their ideas and projects to solve problems of senior citizens of that county. Their ideas are presented individually or in group, analysed by the Municipality and then voted by the Senior Citizens Council. As a result, the proposals are included in the Municipality planning for the coming year.

[www.cm-alfandegadafe.pt](http://www.cm-alfandegadafe.pt)

### **Council for older people (Finland)**

Local authorities must establish a council for older people to ensure the older population opportunities to participate and exert influence as well as see to it that the council has the necessary prerequisites for its operation. The council for older people must be included in the preparation of the plan and the evaluation. The council must even otherwise be provided an opportunity to influence the planning, preparation and monitoring of actions in the different spheres of responsibility of the municipality in regard to matters that are of significance for the wellbeing, health, inclusion, living environment, housing, mobility and daily activities of older persons or for the services needed by the older population.

<http://www.tampere.fi/english/familyandsocialservices/elderly/council.html>

### **Get Engaged!**

The aim of the project is to build capacity for civic engagement among older people primarily in counties within the Age Friendly Ireland framework. The objectives are to increase the number of older people skilled and interested in playing leadership roles in Older Peoples Councils (OPCs) and other local structures, diversify the older peoples voices at the table locally and ensure that older peoples direct interests and concerns can be articulated and reflected in Age Friendly Cities & Counties as the programme is mainstreamed. In each county, there is an assessment of training needs and a county training plan. Training will be offered along a continuum which will involve building on

personal development, progressing on to involvement in the local community and finally addressing leadership at regional and/or national level.

[www.ageandopportunity.ie](http://www.ageandopportunity.ie)



## 5. Checklist

Please find below a practical check list that may help you to review the process design.

### Check-list before starting

- ✓ Have you defined your objectives?
- ✓ Have you defined a team responsible for the process?
- ✓ Have you detected the people to be involved in the process?
- ✓ Have you considered the ethical issues?
- ✓ Have you detected the potential risks and their potential solutions?
- ✓ Have you estimated the resources needed for carrying out the process?
  - Have you involved suitable and enough human resources?
  - Have you considered the economical budget for developing the co-production process?
  - Have you estimated the time needed for the process?
- ✓ Have you defined your communication strategy?

### Check-list for Implementation

- ✓ Recruitment:
  - Have you paid attention to the representativeness of the people involved?
  - Are you aware of the high possibility of withdrawals and have you adopted a strategy to ensure sufficient participation of citizens during the whole process?
  - Have you informed citizens in a comprehensive language about the basic aims of the project?
  - Have you taken measures to ensure that older people understand how they can benefit from their engagement?
  - Have you taken measures to ensure that participants feel that their participation and contribution is valued?
- ✓ Have you selected the tools considering the different characteristics?
- ✓ Have you developed an action plan? Have you defined your indicators?

### Check-list for Monitoring

- ✓ How are you going to measure whether the level of participation and objectives of the project have been achieved?
- ✓ Have you taken written minutes of the different activities? Have you shared them with the participants?

### Check-list for the Evaluation

- ✓ Have you achieved your objectives?
- ✓ Did you need to adapt the initial plan? If so, why?
- ✓ Were the tools used effective to achieve the objectives?
- ✓ What was the impact of the process (changes in policies, raised awareness, citizens)?
- ✓ Were the human and financial resources sufficient to reach the objectives? Could they have been used more effectively?

### Check-list for Dissemination

- ✓ How are you going to communicate the results to the participants and

community?

- ✓ What information are you going to share with them? What are the key messages that you want to communicate?
- ✓ Are you going to use some networks? If so, which ones?
- ✓ Have you reached all the target groups of your communication strategy?
- ✓ Have you adapted your communication to the different targets?

## 6. Glossary

**Active ageing:** It is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age (WHO, 2002).

**Age-Friendly Environments (AFE):** Age-friendly environments foster health and well-being and the participation of people as they age. They are accessible, equitable, inclusive, safe and secure, and supportive. They promote health and prevent or delay the onset of disease and functional decline. They provide people-centered services and support to enable recovery or to compensate for the loss of function so that people can continue to do the things that are important to them (WHO, 2014).

**Co-decision:** It supports sustainability of quality because citizens come to see themselves as owning these decisions. Also citizens may become more knowledgeable through the debate which precedes decisions, and this creates more legitimacy. It is clear that participation in itself may increase satisfaction (Pollitt, Bouckaert, & Löffler, 2006).

**Co-design:** It describes the process of bringing stakeholders into the service design process. At the heart of the approach, it is a move towards user-led process design, possibly also leading to a user-led approach to the delivery of services. This type of co-design could be seen as part of a broader shift towards citizens and professional staff working together to co-produce services in municipalities (SmartCities, 2011).

**Co-production:** LRAs, older people and older people's organisations, working together to design and deliver opportunities, support and services that improve wellbeing and quality of life (Sanderson & NDTI, 2009).

**End-user:** It is a group of people, who benefit from a service, product, technology or policy developed (AGE Platform Europe, 2014).

**EIP AHA:** The European Innovation Partnership on Active and Healthy Ageing gathers stakeholders from the public and private sectors across different policy areas. Together they work on shared interest, activities and projects to find innovative solutions that meet the needs of the ageing population (extracted from the EIP AHA leaflet).

**Participation:** It is a way of working that empowers people to participate in decisions and actions that affect their lives. It is based on the conviction that people have the right to have a say in the way that services they use are set up and run, and that people at social or economic disadvantage often face barriers to influencing decision making (FEANTSA Participation Working Group, 2013).

**Partnership:** It helps to develop a bottom up process and can be used to gather the expectations from different target groups (AGE Platform Europe, 2012).

**Policy-making process:** It has been defined as the process by which governments translate their political vision into programmes and actions to deliver 'outcomes' . desired change in the real world (Economic Policy Unit, 2003)

**Stakeholders:** They are people and groups that can be affected by the AFE or those who can affect the AFE: families of older people, community members, local governments officers, local organisations working with older people, labour organisations, local health workers, etc.

## 7. Acronyms

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AFE: Age - friendly environments

EIP AHA: European Innovation Partnership on Active and Healthy Ageing

WHO: World Health Organisation

LRAs: Local and Regional Authorities

ICT: Information and Communication Technologies

## 8. Useful links

- AFE-INNOVNET Towards an Age-Friendly Europe <http://afeinnovnet.eu/>
- European Innovation Partnership on Active and Healthy Ageing [http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing)
- European Year for Active Ageing and Solidarity between Generations 2012 <http://ec.europa.eu/archives/ey2012/>
- Implementation of the International Plan of Action on Ageing and related activities <http://www.un.org/documents/ga/res/46/a46r091.htm>
- Inclusion Guide for Civil Dialogue Promoting Older People's Social Inclusion [http://www.age-platform.eu/images/stories/106\\_AGE-civil-dialogue-UK-web.pdf](http://www.age-platform.eu/images/stories/106_AGE-civil-dialogue-UK-web.pdf)
- IDeA. Engaging with older people: improving the quality of life for older people. (Local government improvement and development). [www.idea.gov.uk/idk/aio/5821210](http://www.idea.gov.uk/idk/aio/5821210)
- InnovAge . Project. Regional development policies in Eco-independent living for the elderly. <http://www.innovage-project.eu/>
- InnovAge. Guidelines on involving older people in social innovation development [http://www.age-platform.eu/images/stories/Publications/INNOVAGE\\_Guidelines\\_on\\_OP\\_involvement\\_FINAL.pdf](http://www.age-platform.eu/images/stories/Publications/INNOVAGE_Guidelines_on_OP_involvement_FINAL.pdf)
- MOPACT Project . Mobilising the Potential of Active Ageing in Europe: <http://mopact.group.shef.ac.uk/>
- The Dublin declaration on Age-friendly cities and communities in Europe [http://agefriendlyworld.org/en/wp-content/uploads/2014/05/Dublin\\_Declaration\\_2013.pdf](http://agefriendlyworld.org/en/wp-content/uploads/2014/05/Dublin_Declaration_2013.pdf)
- WeDo. Principles and guidelines for the wellbeing and dignity of older people in need of care and assistance [http://www.nhi.ie/zuploads/page\\_docs/european%20quality%20framework%20for%20long%20term%20care%20services%20principles%20and%20guidelines.pdf](http://www.nhi.ie/zuploads/page_docs/european%20quality%20framework%20for%20long%20term%20care%20services%20principles%20and%20guidelines.pdf)
- WHO Age-friendly Environments Programme [http://www.who.int/ageing/age\\_friendly\\_cities/en/](http://www.who.int/ageing/age_friendly_cities/en/)
- WHO Global Network of Age-friendly Cities and Communities [http://www.who.int/ageing/age\\_friendly\\_cities\\_network/en/](http://www.who.int/ageing/age_friendly_cities_network/en/)
- Healthyageing.eu
- Guidelines for conducting a Focus Group: [https://assessment.trinity.duke.edu/documents/How\\_to\\_Conduct\\_a\\_Focus\\_Group.pdf](https://assessment.trinity.duke.edu/documents/How_to_Conduct_a_Focus_Group.pdf)
- Guidelines for organisation developing a refresher workshop for senior road users: <http://www.nzta.govt.nz/traffic/senior-road-users/docs/staying-safe-guidelines-for-organisations.pdf>
- Community Workshops Guidance Document: <http://www.wiseuptowaste.org.uk/docs/waste-recycling-guides/community-workshop-guidance.pdf?sfvrsn=0>
- Guideline. The art and Joy of User integration in AAL projects: [http://www.aal-europe.eu/wp-content/uploads/2015/02/AALA\\_Guideline\\_YOUSE\\_online.pdf](http://www.aal-europe.eu/wp-content/uploads/2015/02/AALA_Guideline_YOUSE_online.pdf)

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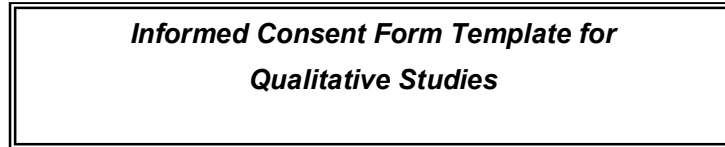
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**Annex I: Informed Consent Form Template for Qualitative Studies (WHO)**

This is an example offered by WHO for qualitative studies. For more information about this tools visit the following link: [http://www.who.int/rpc/research\\_ethics/informed\\_consent/en/](http://www.who.int/rpc/research_ethics/informed_consent/en/)



**(This template is for research interventions that use questionnaires, in-depth interviews or focus group discussions)**

**Certificate of Consent**

This section must be written in the first person. It should include a few brief statements about the research and be followed by a statement similar the one in bold below. If the participant is illiterate but gives oral consent, a witness must sign. A researcher or the person going over the informed consent must sign each consent. Because the certificate is an integral part of the informed consent and not a stand-alone document, the layout or design of the form should reflect this. The certificate of consent should avoid statements that have "I understand" phrases. The understanding should perhaps be better tested through targeted questions during the reading of the information sheet (some examples of questions are given above), or through the questions being asked at the end of the reading of the information sheet, if the potential participant is reading the information sheet him/herself.

*Example: I have been invited to participate in research about malaria and local health practices.*

**(This section is mandatory)**

**I have read the foregoing information, or it has been read to me. I have had the opportunity to ask questions about it and any questions I have been asked have been answered to my satisfaction. I consent voluntarily to be a participant in this study**

**Print Name of Participant** \_\_\_\_\_

**Signature of Participant** \_\_\_\_\_

**Date** \_\_\_\_\_

**Day/month/year**

***If illiterate***<sup>3</sup>

<sup>3</sup> A literate witness must sign (if possible, this person should be selected by the participant and should have no connection to the research team). Participants who are illiterate should include their thumb print as well.

I have witnessed the accurate reading of the consent form to the potential participant, and the individual has had the opportunity to ask questions. I confirm that the individual has given consent freely.

Print name of witness \_\_\_\_\_

Thumb print of participant

Signature of witness \_\_\_\_\_

Date \_\_\_\_\_

Day/month/year

**Statement by the researcher/person taking consent**

I have accurately read out the information sheet to the potential participant, and to the best of my ability made sure that the participant understands that the following will be done:

- 1.
- 2.
- 3.

I confirm that the participant was given an opportunity to ask questions about the study, and all the questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and the consent has been given freely and voluntarily.

A copy of this ICF has been provided to the participant.

Print Name of Researcher/person taking the consent \_\_\_\_\_

Signature of Researcher /person taking the consent \_\_\_\_\_

Date \_\_\_\_\_

Day/month/year

**Annex II: Model for the development of a communication strategy (IDRC and SDC, 2008)**

1. **Review:** *How have we been communicating in the past? How effective has that been? How do our audiences perceive us?*
2. **Objective:** *What do we want our communications to achieve? Are our objectives SMART?*
3. **Audience:** *Who is our audience? Do we have a primary and a secondary audience? What information do they need to act upon our message?*
4. **Message:** *What is our message? Do we have one message for multiple audiences or multiple messages for multiple audiences?*
5. **Basket:** *What kinds of communications “products” best capture and deliver our messages?*
6. **Channels:** *What channels will we use to promote and disseminate our products?*
7. **Resources:** *What kind of budget do we have for this? Will this change in the future? What communications skills and hardware do we have?*
8. **Timing:** *What is our timeline? Would a staged strategy be the most appropriate? What special events or opportunities might arise? Does the work (or future work) of like-minded organizations or ministries, etc., present opportunities?*
9. **Brand:** *Are all of our communications products “on brand”? How can we ensure that we are broadcasting the right message?*
10. **Feedback:** *How will we know when our communications strategy is 100% successful? What will have changed? How can we assess whether we used the right tools, were on budget and on time, and had any influence?*

### Annex III: Example of an Action Plan

Goal of the process: Meetings for the search for innovative solutions for AFE							
What needs to be done?	Implementation				Evaluation		
	Who is responsible for this?	Who will need to be involved to carry out this task?	Resources	Deadline	What evidence indicates progress?	What are the results?	Which indicators should be evaluated?
Objective 1: Meet the concept and benefits of AFE							
Discuss AFE	Mr. Smith	Older people, stakeholders	Room, computer, internet access, coffee break	October 20 <sup>th</sup> (morning session)	People participate in discussion		List of attendance
Analyse the context where we live? is it an AFE?	Mr. Smith		Room, computer, internet access, blackboard, crayons, ticket to lunch	October 28 <sup>th</sup> (all day)	People actively participate in the brainstorming	A list with some ideas expressed by people	List of attendance
Objective 2: Meet good practices in other cities/countries who consider and applied the AFE approach							
Discuss the good practices that we found in another cities	Ms. Barrow		Room, computer, internet access, video, audio, coffee break	November 4 <sup>th</sup> (afternoon session)			
Compare our context (analysed in the objective 1) with the good practices presented	Ms. Barrow		Room, computer, internet access, material with				
Analyse the feasibility of implementing some aspects in our context	Ms. Barrow						

**Annex IV: Some ideas to monitor and evaluate the meetings.**

**An example of a scale of a reflective appraisal to evaluate the meetings (Robinson, 2005):**

**1. To what extent did you participate in recent activities?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**2. To what extent did these activities meet your expectations at the time?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**3. Think back to the activities in which you were involved. To what extent did you learn more about the issues at stake?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**4. To what extent did you become more interested in the issues covered by the project?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**5. To what extent did you acquire more skills?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**6. To what extent do you feel more connected to your community?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**7. To what extent did you become more determined to try new practices?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**8. To what extent have you put to use the ideas or skills you learned in the project?**

Not at all Greatly				Slightly				Moderately			
0	1	2	3	4	5	6	7	8	9	10	

**9. To what extent have the ideas and skills you acquired already enabled you to make personal changes?**

Not at all Greatly	Slightly			Moderately									
0	1	2	3	4	5	6	7	8	9	10			

**Two examples of questionnaires are offered to apply and evaluate the meetings (Taylor-Powell & Marcus, 2009):**

**Questionnaire 1: meet the perceived changes in motivation, confidence or abilities.**

1. To what extent do you feel more able to (ō ) as a result of this training:

Not at all	Very little	Somewhat	Quite a bit	A great deal
1	2	3	4	5

2. As a result of this course, I feel that I can:

3. Which of the benefits listed below have you gained from taking part in a workshop like this? Please check any which you feel you have gained)

- a. \_\_\_\_ greater confidence
  - b. \_\_\_\_ increased morale
  - c. \_\_\_\_ support from others with similar problems
  - d. \_\_\_\_ increased motivation
  - e. \_\_\_\_ other
- 

4. Benefit to me from today's workshop:

	Poor	Fair	Good	Excellent	NA
a. Stimulated me to think	____	____	____	____	____
b. Motivated me to want to learn more	____	____	____	____	____
c. Motivated me to do something different	____	____	____	____	____

5. The opportunity to present what I learned to my peers helped to reinforce my learning and confidence

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1	2	3	4	5

## Questionnaire 2: needs related to the current session.

*What do participants feel they still need to know about the topic at hand? In what areas do they feel they could use more practice? What is the best way to provide this additional programming? If you collect this information, make sure to respond to participant feedback to show that you take their opinions seriously.*

1. Would you like more information on any topic we covered today?
  - a. Yes
  - b. No
  - c. If yes, please list your questions or topics
2. What would you like covered that wasn't covered today?
3. What kind of follow-up on today's workshop do you think would be helpful?
4. What assistance do you need in order to put into practice the ideas covered in this workshop?
5. Where do we go from here?
6. What additional information do you feel you need?
7. Do you have any suggestions that might help the group continue its learning?
8. Are there any topics you feel should be added to this session?

**Annex V. An evaluation report sample** Fuente especificada no válida.

1. **Title page:** The title page presents the program name, dates covered, and possibly the basic focus of the evaluation in an easily identifiable format.
2. **Executive summary:** This brief summary of the evaluation includes a program description, evaluation questions, design description, and key findings and action steps.
3. **Intended use and users:** In this section, the primary intended users and the ESW are identified and the purposes and intended uses of the evaluation are described. This section fosters transparency about the purposes of the evaluation and who will have access to evaluation results and when. It is important to build a market for evaluation results from the beginning.
4. **Program description:** This section will usually include a logic model, a description of the program's stage of development, and a narrative description. This section leads to a shared understanding of the program, as well as the basis for the evaluation questions and how they are prioritized.
5. **Evaluation focus:** This section focuses the evaluation by identifying and prioritizing evaluation questions on the basis of the logic model and program description, the program's stage of development, program and stakeholder priorities, intended uses of the evaluation, and feasibility.
6. **Data sources and methods:** This section addresses indicators and performance measures, data sources and rationale for selection of methods, and credibility of data sources. Data need to be presented in a clear, concise manner to enhance readability and understanding.
7. **Results, conclusions and interpretation:** This section describes the analysis processes and conclusions and presents meaningful interpretation of results. This is a step that deserves due diligence in the writing process. The propriety standard plays a role in guiding the evaluator's decisions in how to analyze and interpret data to assure that all stakeholder values are respected in the process of drawing conclusions. The interpretation should include action steps or recommendations for next steps in either (or both) the program development and evaluation process.
8. **Use, dissemination and sharing plan:** This is an important but often neglected section of the evaluation plan and the evaluation report. Plans for use of evaluation results, communication, and dissemination methods should be discussed from the beginning. The most effective plans include layering of communication and reporting efforts so that tailored and timely communication takes place throughout the evaluation.
9. **Tools for clarity:** Other tools that can facilitate clarity in your report include a table of contents; lists of tables, charts, and figures; references and possibly resources;

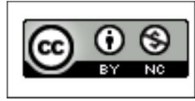


and an acronym list. Appendices are useful for full-size program logic models, models developed through the evaluation, historical background and context information, and success stories.

An evaluation report commissioned by Southway Housing Trust that prioritizes the role of older people in Old Moat in producing the research and developing plans to improve the age-friendliness of the area, this research was also developed in collaboration with key stakeholders who can influence the age friendliness of the neighborhood of Old Moat and the City of Manchester **Fuente especificada no válida..** You can consult the report in the following link:  
<http://www.bjf.org.uk/web/documents/page/OLD%20MOAT%20%20AGE%20FRIENDLY%20CITIES.pdf>

**Annex VII: An example of dissemination plan (Diva consortium, 2011):**

What	To whom	How to do it?	When	Resources
Project website	Target audience Stakeholders General public Partnership	All partnership languages. Reserved and public areas. Registered users Membership Topic (not only project) related materials/news Google analytics Downloadable documents Tools for fun (tests, games) Recommended by (important organisation/body) Linked to other websites (partners, networks, etc.) Virtual tools	Month/Year	Px (amount foreseen)
Newsletters (N x)	Target audience Associations in the field Stakeholders Supporters Partners± networks National agencies Local national media European organisations in the field	E-news Downloadable from the project website All partnership languages	1. At the end of Research (Month/Year) 2. Before Piloting (Month/Year) 3. After Piloting (Month/Year) 4. Before End (Month/Year)	All partners (2 working days by partner)
Final Workshops		Local workshops with similar structure and evaluation Presentation of final products The final products and flyer to be widely distributed Reporting	Until Month/Year	All partners (Amount foreseen)



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