

Final Report

Project title: Active@Work – Individualised Working Facilities, Innovative Strategies and Alternative Working Arrangements to Promote Active Ageing

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1. Summary

Active@Work addressed the sub-theme of management of demographic change. The main priority issue addressed was development and piloting of alternative working arrangements at enterprise level to improve the quality of work for ageing and older workers which includes maintaining the health and well-being of workers. It consists of different means such as rethinking the way work is organised, adapting work processes and making working arrangements more flexible. Active@Work aimed to increase the ability of enterprises to utilise alternative working arrangements as a mean to prevent the early retirement of their employees.

Active@Work was divided into three sub-projects which were implemented in Finland, Germany and Italy. Each of them aimed to improve the quality of work for older workers and to support sustainable well-being and motivation to work longer.

Ageing and wellbeing at work includes personal experiences. The development of individualised working facilities requires a close understanding of ageing workers' work content, practices, needs and motivations. The *Finnish sub-project* investigated ageing workers' wellbeing from the individual workers' perspective, through the use of user-centred design approach. The main objective of the effort was to enable and support individual workers' sustainable wellbeing and motivation to work longer. The work was divided into three sub-tasks: 1) to gather a holistic understanding of ageing workers' individual needs, attitudes, motivations, working practices and environments, 2) to identify potential improvement opportunities and 3) to develop concept proposals to support individual working abilities and motivations. Furthermore, narrative and visualised descriptions of the work and the workers were aimed to fuel a dialogue within and outside the target organisation.

The *Finnish* was led by the School of Design at the University of Art and Design Helsinki (Uiah). Other Finnish partners involved were the Institute for Extension Studies (TYT) at the University of Tampere (UTA) as the coordinator of the project, the Northern Pirkanmaa Institute of Education as expert in adult education and the Confederation of Finnish Industries EK as expert in industrial perspective.

The target organization Palmia in *the Finnish Active@Work-project*, owned by the city of Helsinki, operates in the fields of catering, cleaning and technical maintenance. The ageing individuals who were in the focus of the study, were Palmia employees consisting of 13 workers from cleaning maintenance and from technical maintenance. The main concern of Palmia in the project was to develop new solutions to benefit their substantially large proportion of ageing workers. A high number of their employees are between ages of 48 and 59 and the work is physically demanding. Apart from that cleaning and technical maintenance is a field that does not attract younger people. The organization Palmia had expectations concerning the project such as how to consider age

in the planning of work, how to profit from the long working experience of the ageing workers and how to apply new technology at work.

The project started with a challenge of developing ideas and solutions focusing on personal well-being at work. The range of opportunities found varied from new or improved products and tools to new organisational processes and practices.

The well-being of an individual constitutes of various factors from mental and physical issues to short term and long term experiences. Improvement of social well-being could benefit from creating systems and practices for supporting interaction with superiors, for enhancing the belongingness to a worker community, for facilitating social contacts with the team or with co-workers, who can also be people from other organisations, such as customers that they encounter in their workplace. The professional well-being could be enhanced by the development of practices in co-ordination, sizing of work, and clarification of a worker's responsibilities. Cognitive well-being could be improved by introducing novel ICTs that appreciate the abilities of the ageing workers as well as their changed physical capacities. The physical well-being could be improved by developing the tasks and environments (e.g. climbing stairs, lifting). This includes ergonomics but also aesthetic aspect of the workplace. Moreover, the development of physical tools and machines could better appreciate the reducing physical power and endurance, more rigid body, and personal disabilities.

The work group of the German Active@Work sub-project consisted of Empirica as the national facilitator and co-ordinator and SAP, Continentale and Deutsche Bank as pilot user organisations. Concepts of alternative working arrangement for older workers were developed for each of these end-user organisations.

The project identified problems and obstacles that enterprises tend to face in the adoption and implementation of the alternative working arrangements and developed practical solutions to these problems. These solutions have taken the format of concepts and measures for innovative forms of employment actively supporting ageing in employment, thereby addressing younger and older workers and developing related necessary actions at SAP, world leader in business software solutions, Deutsche Bank, the largest German bank and Continentale, a large German insurance company. Several of these measures have partially been implemented already or will be implemented in the near future.

Several of the measures implemented or going to be implemented will become mainstream activities and "normal" offers for the workforce in these organisations in the future.

All three user organisations have in the meantime gained a lot of experiences in piloting and experimenting with innovative forms of working addressed to older workers and - after successful pilot projects - stepwise transferring these

into the general work flexibilisation offers for their staff members. It is very likely that most of the presently developed measures and activities will find their way to implementation in the near future. Others, as articulated by the staff members as part of the evaluation exercise, have good chances to be taken on board as well.

The main output of the *Italian sub-project* is Seniority Social Certification protocol. It stems from an analysis of CSR (Corporate Social Responsibility) model and has been developed in several brainstorming sessions with national partners and stakeholders experts. Seniority Social Certification (that isn't properly a certification, at the moment) represent in fact a self evaluation tool that companies can voluntarily use to estimate their performances in the promotion of active ageing and to facilitate the development of new policies for enterprise management.

It is based on a voluntary approach, because it concerns the basic purpose, orientations and choices (policies) of enterprises, which cannot be statutory or imposed: the SSC model can be considered a kind of map, a common reference framework for the enterprises at local level. This map is made up of a modular and flexible set of indicators, organized in a framework divided in:

1. *Dimensions*: that are the dimensions of enterprises organization. They are three: Staff, Turnover and Administration;
2. *Categories*, thematic areas monitored by groups of indicators. In the "quantity form" there are 5 categories: Human resources, Turnover, Training, Working schedule and Absences. Each of them is composed by indicators or groups of indicators. The "quality" form is divided in 6 categories: Turnover, Training, Incentive policies, Health and safety, Policies and Awareness.
3. *Indicators*, can be quantitative (in the quantitative form) and qualitative (in the quality form). The 74 indicators provide information concerning specific aspects of enterprise organization.

The model is composed of a "quantitative" and a "qualitative" form, strictly linked up with each other. The first form represent a quantitative measurement table, able to define an empirical scenario of the enterprises: the features of employees, the type of contract, the turnover flows, the number of contract cessations, the training, are some of the items include in this table. On the other side, the qualitative form defines the level of application of some policies in the enterprises context: i.e. the training typologies implemented, Incentive typologies supported by the company, the health promotion activities adopted, the staff employment policies (like mentoring, outplacement, tele-work, the outsourcing, etc.).

When the enterprise responsible has filled the two questionnaires, the program (SSC model is a questionnaire in an excel file) will automatically

elaborate the data. The calculation matrix as well as weights and indicators measurement system developed elaborate the data of the tables.

The final output of the system is represented by a synoptic table able to summarize the elaborated data, giving back a synthesis of enterprise situation concerning the dimension previously considered (turnover, training, incentives to maintenance, etc.), divided for gender and for staff typologies. The different colors of each cell illustrate the enterprise strengths and the elements of complexity: while the blue and the green color can be considered indicators of a good level of application of the policies (in relation with the incidence of over 45 employees on the total of workers), the yellow and the red color suggest that some problems can be presented in the management of over 45 employees.

Final output (an example)

	Over	Over Male	Over Female	Factory workers	Factory Workers Male	Factory Workers Female	Office employees	Office employees Male	Office employees Female	Managers	Managers Male	Managers Female
Turnover Indicator	Yellow	Yellow	Green	Yellow	Red	Yellow	Green	Yellow	Light Blue	Light Blue	Light Blue	Red
Training Indicators	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Red	Red	Red
Incentives to maintenance	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Light Blue
Health promotion and protection	Yellow	Green	Yellow	Yellow	Green	Yellow	Yellow	Green	Yellow	Yellow	Yellow	Yellow
Staff employment policies	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Light Blue
Awareness	Green	Yellow	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Yellow	Green

Other graphs and tables can be generated by the program, too.

Other outputs of Italian project were:

- the analysis of the local industrial scenario (the target area was Province of Lecco), of current trends and emerging issues;
- the best practices and policies review, concerning innovative strategies of active ageing management at national level;
- the publication of a book in print form including an overview of Active@Work project, a description of ageing policies in national context, an overview of Province of Lecco labor market, the

outputs of the survey conducted in Lecco Province and the model of SSC

Different kinds of Dialogue Forums were established in the project to intensify discussion concerning alternative work arrangements for aging work force. The Dialogue Forums acted at two levels, at transnational and at national level. The main activities were

- to assess the transfer and generalisation potential of results of the three sub-projects
- to model the implementation process of alternative working arrangements
- to assess the transfer and generalisation potential of the process model

As one output of the project the enterprises were provided with a model of implementation of alternative work arrangements for ageing and older workers. The Active@Work process model divides the promoting of active ageing at work into four clear phases and activities in order to help planning and implementing improvements in working conditions. Furthermore, the model provides practical tools and examples for development, implementation and evaluation of measures for active ageing at work:

A. Definition of Challenges	B. Solution Generation	C. Implementation	D. Effectiveness Evaluation
A1 Literature study and experience review	B1 Project structure and management definition	C1 Selection of pilot areas	D1 Evaluation planning
A2 Situation analysis	B2 Generation of solutions and measures	C2 Pilot planning and implementation	D2 Evaluation work
A3 Problem framing	B3 Approval of the solutions and measures		D3 Analysis of the data
A4 Approval of objectives			

The model is available in web:

<http://www.uta.fi/tyt/kkp/projektit/activeatwork/processmodel/index.php>

2. Detailed account of the activities undertaken in the project

2.1 The Finnish Active@Work sub-project

2.1.1 Introduction

The Finnish sub-project *Individualised working facilities for ageing employees* focused on understanding ageing workers' individual work content, practices and needs. The main objective was to enable and support individual workers' sustainable well-being and therefore motivation to work longer. The three sub-objectives were:

- to gather understanding of ageing workers' individual needs, attitudes, motivations, working methods and environments
- to identify opportunities for concept design and
- to develop proposals and concepts, which aim at supporting individual working abilities and motivations. Furthermore, the narrative and visual descriptions of individual workers and their tasks as one of the outcomes of the sub-project aim at concretising and supporting insights and dialogue within the organisation but also with the partners

The Finnish sub-project applied user-centred product concept design methods including observations, self-documenting, participatory workshops and multidisciplinary interpretations and ideations. The starting point of user-centred concept design is open and the focus is adjusted iteratively during the process. The process has three steps:

- setting the stage: background study, superior interviews
- user studies: focus groups, self-documenting, interviews, interpretation sessions
- concept design: participatory observations, interpretation and ideation workshops, scenario and concept designs.

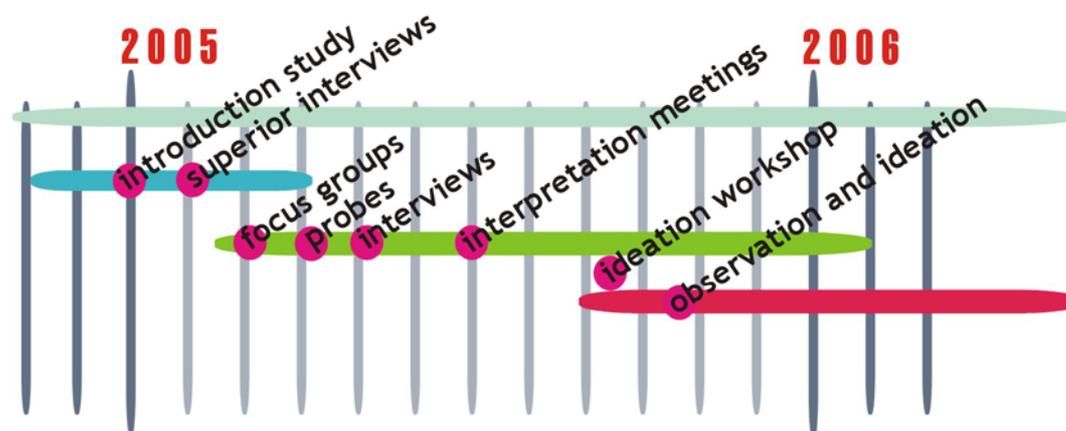


Image 1. Timeline and current activities of the sub-project.

The sub-project had several partners: Tampere University (UTA), EK, Pirko and furthermore University of Art and Design Helsinki (UJAH) as a sub-project

leader and Palmia as the focus organisation. Palmia offers services in catering, cleaning and technical maintenance mainly in the City of Helsinki.

The ageing individuals who were in the focus of the study are Palmia employees. Palmia's concerns are that their working force is ageing. A high number of their employees are between 48 and 59 and as the work is physically hard most of the health problems are caused by joint problems. Furthermore cleaning and technical maintenance is a field that does not attract younger people anymore. Palmia expressed expectations concerning the project such as:

- How to consider age in the planning of the work
- How to profit the long working experience
- How to apply new technology at work
- What kind of ergonomic improvements can be found
- How to support people to work longer
- How to have less sick leaves
- How to improve the atmosphere at work

2.1.2 Detailed account of the activities undertaken in the Finnish sub-project

The project began with an extremely open brief: broadly to find new opportunities to develop work. At the beginning of the project very little was known about the phenomena and the direction of the design solutions. There was no explicit need, problem or technology to be addressed. In concept design a wide and fuzzy starting point is typical, and the aims and solutions are developed as well as the focus of the problem-solution space is adjusted iteratively during the process (Keinonen & Takala 2004, Mattelmäki 2006).

To approach these challenges the Finnish sub-project applied user-centred design methods including observations, self-reporting, interviews, participatory workshops, generative tools and multidisciplinary interpretations and ideations (see also Mattelmäki & Lehtonen 2006). Using different methods was seen as a way to narrow the "design space" (Westerlund 2005), to gain a holistic understanding of the individual ageing workers' needs and desires, and to find the most relevant directions for progress. The process had three steps: a) setting the stage, b) user studies and c) concept design. In the following these methods are described in more detail:

a) *Setting the stage phase* aimed at defining the user study plan in more detail, i.e. selecting the most appropriate user study tools and process which suite the aims of the whole project and deciding the most appropriate groups for the study. These decisions were made in collaborative meetings together with UIAH, Palmia and UTA representatives. Target groups, altogether 13 individuals aged 55+ are workers in cleaning maintenance and in technical maintenance.

The worker groups were contacted and individuals were recruited in Palmia by division managers with support from the CEO and head of human resources. Project manager from UIAH also gave a short presentation about the project in a seminar organised for Palmia employees.

A national kick-off was organised in UIAH in February 2005 to discuss the plan, to present objectives and preliminary findings and to establish a common ground for the project. Also a literature review that aimed at gaining background understanding about the phenomena of ageing at work was done to support the study. (Annex 1. Jacobson: English summary about the background study February 2005)

Superior interviews were conducted to gain an overview about the flow of work and tasks of the workers. We also wanted to inform the superiors about the study and to get familiar with the field of technical maintenance and cleaning maintenance. During the superior interviews also observations were carried out in the work context. The preliminary findings and visual data were used to plan the following focus groups. A summary about the findings was done and distributed to the head of Palmia, to the relevant superiors and to Palmia communications to be available to interested employees.

b) *User study phase* started with two focus groups which were organised at UIAH, one for the two groups of ageing individuals. The objectives of the focus groups were to introduce the project and the group to each other and to discuss the phenomena of ageing and working. The discussion included topics such as what do they find motivating in their work, what affects negatively to the motivation and what are the things that matter to them when linking work and life.

The data were sorted out to a summary and used to brainstorm and design the self-documenting kits for the following action. This summary was sent to the head of Palmia and all the participants with a possibility to comment the interpretations. These summaries (from superior interviews and focus groups) and preliminary interpretations of problems and possible solutions were presented to the head of Palmia in April 2005. This meeting led to another presentation for Palmia superiors' seminar in which Active@work project and the preliminary insights of the ongoing study were presented and where also one of the ageing workers and one of the superiors of the ageing participants told the audience about their experiences about the project. These activities were part of the awareness rising in the organisation.

To approach the individual context we applied probes self-documenting that aimed at gathering subjective views into the ageing workers' experiences. Probes are custom designed kits of materials and tasks that empower the participants to report on their experiences, as well as express their reactions. The probes were tuned to mapping the ageing workers' characteristics, creating a picture of their everyday life and to identify design possibilities (see Mattelmäki 2006 about probes).

The probes were given to the 15 ageing workers for ten days. The probes kit included a timetable, a map, a camera, a task book and two post cards. With these tools we wanted to get a picture of their work and to gather ideas and opinions inspired by the probes tasks. The probes were complemented with individual interviews.

The data were sorted out and interpreted in several team meetings in UIAH to get more detailed understanding about the phenomena and the individual point of views. Also, into one of these meetings UTA representatives were invited. These interpretations resulted persona descriptions, a summary about ageing, changes and holistic wellbeing (in Finnish), various visualizations and preliminary concept frames to be applied in the following phases. The identified frames included topics such as communication and transfer of knowledge; enhancing community; planning and sizing work; feedback and encouragement; expertise; learning and education; ergonomics and physics, small pleasures and pick ups and listening and engaging the employees. The identified ageing worker characteristics were developed into persona descriptions. The persona descriptions are none of the workers as such but based on their characteristics, tasks and attitudes combined.

In June 2005 two interpretation sessions were organised in UIAH with the two groups of ageing individuals to find out meaningful themes in a participatory manner and to evaluate the drafts of illustrated persona descriptions as well as the first concept ideas. After the session the eight personas were elaborated further into more detailed descriptions.

In September 2005 a workshop for collaborative interpretation and brainstorming for the Finnish partners was organised. The objectives of the workshop were to 1) share and sort out the data and interpretations 2) take into account the partners' visions and interests and 3) to ideate and focus directions for following phases. The participants were sent persona descriptions and pre-tasks to get familiar with the individual personas and then to be able to share their insights with the others. They were asked to interpret the material and present to the others problems and needs, positive aspects and concept design opportunities.

The workshop participants (7 people from Palmia, 2 from UTA, 2 from Pirko and 5 from UIAH) were divided into three groups which focused on three different perspectives which were identified from the user data. During the workshop an intensive brainstorming was carried out and resulted wealth of ideas. The summary of the workshop interpretations and ideas was distributed to the participants.

c) During fall 2005 the user study phase continued linked with *concept design* activities. Observations were conducted in the work context and generative tools were applied to achieve more concretized, individualized and contextual design frames. To deepen our understanding and to get more relevant ideas for the mobile systems, we gave the ageing workers opportunities to actively participate in the design phase by combining generative make-tools (Sanders

& Dandavate 1999) with video observations. Make-tools are tangible design items which can be used to facilitate ideation and expression of needs. With the help of these “things-to-think-with” the ageing workers imagined possible features and usages for a dream device and acted out some of their ideas. The video material has of use to identify forms of “tacit knowledge” of the ageing workers. Two workshops were organized in spring 2006 to interpret and make sense of the material.

During winter 2006 future visions of improved tools were developed at UIAH inspired by the user study. During spring 2005 design efforts considered an improved working environment for a school attendant and visions for features and uses of future mobile technologies. To support concept design activities literature reviews were done to map well tried practices and get an understanding of adult learning.

March 2006 a collaborative workshop was organized to gain feedback about the concept design ideas and to decide direction for the following activities concerning the mobile technology vision and new educational practices at Palmia. The educational practices development took place in three collaborative workshops during summer 2006 which were lead by Pirko representatives.

The mobile technology vision was further developed in UIAH. The educational practices task was mostly the responsibility of Pirko. This task was also conducted in a collaborative sessions during summer 2006 in which the current state of art and the needs and opportunities at Palmia were mapped and then developed.

A final workshop for the national partners including the head of Palmia and the ageing workers was organized in September 2006 at UIAH. Along with other presentations and discussion in groups the three Palmia directors expressed their experiences of the meaning of the Active@work project to the organization and their visions of next steps.

2.1.3 Towards individual design concept solutions

The project started with a challenge of developing ideas and solutions focusing on personal well-being at work. The well-being of an individual constitutes of various factors from mental and physical issues to short term and long term experiences. The range of opportunities varied from new or improved products and tools to new organisational processes and practices. All together the amount of ideas created and documented during the project is approximately 165 (see Annex 2. Vaajakallio: Ideataulukko October 2006).The following list shows the most important identified areas to develop solutions for.

Improvement of social well-being could benefit from creating systems and practices for supporting interaction with superiors, for enhancing the belongingness to a worker community, for facilitating social contacts with the

team or with co-workers, who can also be people from other organisations, such as customers that they encounter in their workplace.

The professional well-being could be enhanced by the development of practices in co-ordination, sizing of work, and clarification of a worker's responsibilities. The expertise and experience of the ageing workers could be better appreciated in the management of the work, e.g. through solutions that enable the ageing workers to participate in the work planning. Moreover, the independence of the workers and freedom in work were seen as very important by the ageing workers. Planning participation would empower the workers to gain a greater influence in their work content as well as would increase the interaction between management and workers, which was desired by most of the participating workers. Also, more sensitive gratification policies were desired. This was seen as an important facilitator for increasing the employer's understanding of the value of the ageing workers loyalty to work. The professional well-being could also be developed by creating novel individual career planning and education practices. These practices would consider both physical and cognitive changes through ageing and enhance the sharing of gained skills, knowledge and experience in the organisation. Apart from that new means to collaborative use of resources could be developed.

Cognitive well-being could be improved by introducing novel ICTs that appreciate the abilities of the ageing workers as well as their changed physical capacities. ICTs that would support memory, improve the visual presentation, clarified instructions, interactive work planning, help to automate things, and provide enjoyable atmosphere to work in appropriate conditions. The physical well-being could be improved by developing the tasks and environments (e.g. climbing stairs, lifting). This includes ergonomics but also aesthetic aspect of the workplace. Moreover, the development of physical tools and machines could better appreciate the reducing physical power and endurance, more rigid body, and personal disabilities.

2.2 The German Active@Work sub-project

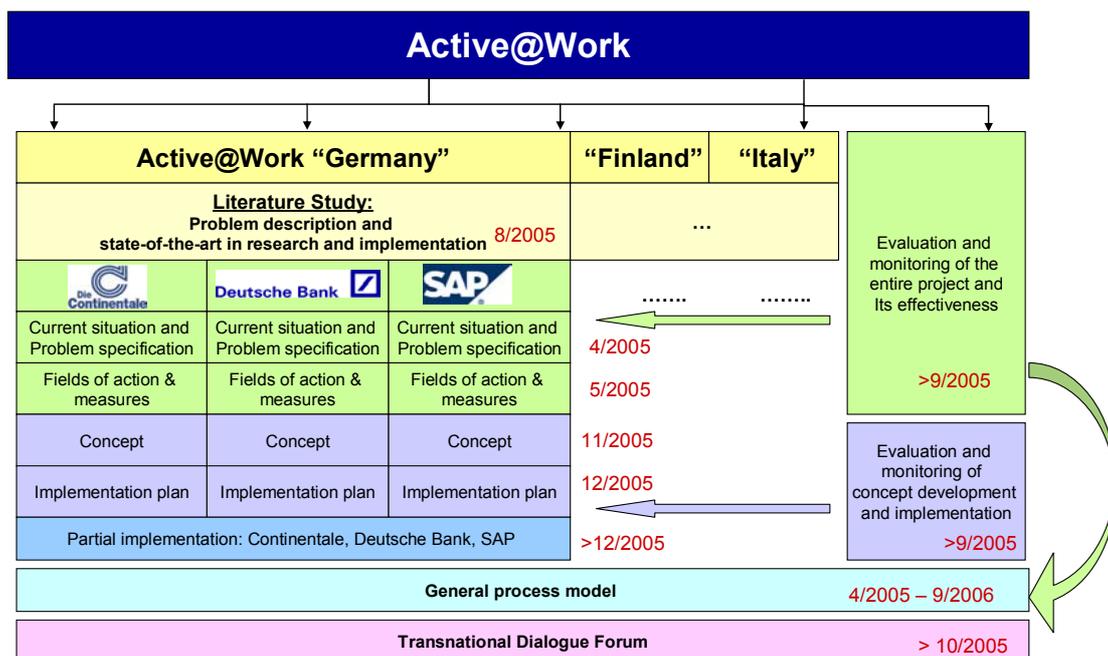
2.2.1 Introduction

The objectives of the German Active@Work sub-project *Innovative Strategies and Concepts of Alternative Working Arrangements and Active Ageing* were the

- development of measures and concepts of alternative working arrangements for ageing and older workers in three user organisations
- partial implementation of these concepts on a pilot basis
- evaluation of implementations and implementation process throughout the entire piloting process.

The development work in the project was based on and derived from the specific problem situations in the user organisations.

The different phases of the workplan – including *problem specification*, *concept development* and *implementation and piloting* - are depicted in the following overview:



The work group of the *German Active@Work sub-project* consists of Empirica as the national facilitator and co-ordinator and SAP, Continentele and Deutsche Bank as pilot user organisations. Concepts of alternative working arrangement for older workers were developed for each of these end-user organisations.

2.2.2 Detailed account of the activities undertaken in the German sub-project

The work in the German sub-project started with literature analysis (Annex 3. Literaturanalyse 2006) and with empirical work in three user organisations. The literature study resulted in the identification of organisational challenges and possible fields of action concerning ageing and older workers. An overview of possible fields of action derived from these challenges together with possible actions and instruments is presented in the figure below:



The empirical work included the analysis of the current situation in three user organisations. The investigations aimed at a stock-taking of existing activities in the area of “compensation & benefits” used and operated in the user organisations, activities which are addressed and are of relevance to the entire staff and for the employment of an ageing workforce and especially those addressed to older workers.

The investigations were followed by an analysis of the age structure of the workers in these organisations at very detailed levels and differentiated according to many parameters (age, gender, duration of stay with the organisation, fluctuation, sick-leave, engagement in further education etc.) and for all different locations and company units of these organisations. The objective was to identify existing models, instruments and working arrangements offering flexibility to workers and to discover the employer, training and life-long-learning, placements and new orientations related services.

Detailed problem specification work based on these thoroughly developed stock-taking results was carried out subsequently. The analysis work led to the definition of the problem situation, objectives and intended achievements concerning ageing and older workers in the three user organisations.

In a further step the partners agreed on the different fields of action to be addressed in the different user organisations and for which measures supporting the employment of older workers and an ageing workforce are to be developed. Subsequently work on the development and specification of such measures started. The aim was to integrate the different measures either to separate concepts or an overall concept for the employment of age-diverse, ageing and older workforce in the three user organisations. The concepts developed include the description of possible:

- fields of action
- types of measures
- concrete measures and their description
- criteria for the selection of the organisational unit which lends itself best to an implementation of measures
- key actors in the different units necessary for a successful (partial) implementation
- Utility of measures
 - Goal achievement
 - Strategic impact
 - Utility for a) staff, b) company
 - Potential for implementation

and were enlarged by a concrete implementation plan supporting the partial implementation of concepts in the user organisations starting in early 2006.

The measures and concepts developed were validated within the different user organisations in two iterations and (where appropriate) with external experts including the TDF (Transnational Dialogue Forum). The results became available in November 2005 and were used for the further development and refinement work in relation to the measures and concepts for implementation.

Measures foreseen for implementation in these organisations are depicted in the following overview.

 Continentale	Deutsche Bank  Deutsche Bank	 SAP
1. Annual staff meetings/discussions also for 55+ 2. Check and adaptation of training centre offers for 50+ 3. Targeted information	1. Strengthening of own responsibility for personal development and life-long-learning 2. Awareness building workshops for superiors	1. Sensitation of superiors and staff members for the challenges of demographic change at SAP 2. Newsletter Health

campaigns re older staff through Intranet 4. Superior training seminars to address demographic change implications 5. Sensitation of superiors for 50+ issues 6. Intensification of absenteeism management 7. Use and targetted extension of health management 8. Support for an active provision for one's old age („Wertguthabenmodell") 9. Central contact point for special issues on life situation 10. Eldercare	3. Superior workshops „Younger manage older staff" 4. Training for „Age Diversity Consulting" 5. Personal Development Plan also for 45+ 6. Anchor ‚employability' within personnel development 7. Marketing of employability trainings to increase demand 8. Stronger communication of health programmes	3. X% Jobs and career models 4. Face-to-face knowledge transfer 5. Management of age-diverse groups (management training) 6. Working time account as Life working time account 7. Workshop Work Life Management for 45+ 8. Individual coaching 9. Wellness checkpoint 10. Health care and sports programmes 11. Eldercare
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The status of implementation of measures in September 2006 is depicted in the following tables.

CONTINENTALE	
Measures	Status of implementation and future
1. Annual staff meetings/discussions also for 55+	- offered and to be continued
2. Check and adaptation of training centre offers for 50+	- done, completed
3. Targeted information campaigns re older staff through Intranet	- Deferred to 2007
4. Superior training seminars to address demographic change implications	- offered and to be continued
5. Sensitation of superiors for 50+ issues	- offered and to be continued
6. Intensification of absenteeism management	- offered, further intensification depends on further demand and supply

7. Use and targetted extension of health management	- offered and to be continued
8. Support for an active provision for one's old age („Wertguthabenmodell“)	- feasibility study completed, implementation deferred to 2007
9. Central contact point for special issues on life situation	- offered and to be continued
10. Eldercare	- first steps completed, further steps deferred to 2007

DEUTSCHE BANK	Deutsche Bank 
Measures	Status of implementation and future
1. Strengthening of own responsibility for personal development and life-long-learning	- Implemented as part of the initiative “perspective for potentials” and employability training for managers
2. Awareness building workshops for superiors	- Integral part of Diversity Management workshops, to be included into regular leadership programs
3. Superior workshops „Younger manage older staff“	- to be implemented and included in leadership program, actually only subject if participants bring up this issue
4. Training for „Age Diversity Consulting“	- Pilot for HR, roll-out planned after restructuring phase
5. Personal Development Plan also for 45+	- Implemented for all employees, measures for 45+ to be identified
6. Anchor ‚employability‘ within personnel development	- Implemented as part of our initiative “in eigener sache”
7. Marketing of employability trainings to increase demand	- Part of “in eigener sache”, but no age specific communication
8. Stronger communication of health programmes	- Actually, feasibility study in progress, decision not made yet for age specific offers, results in Q4 2006

SAP	
Measures	Status of implementation and future
1. Sensitation of superiors and staff members for the challenges of demographic change at SAP	- offered and to be continued
2. Newsletter Health	- offered and to be continued
3. X% Jobs and career models	- offered, further activities deferred to 2007

4. Face-to-face knowledge transfer	- done, completed
5. Management of age-diverse groups (management training)	- offered, further concept development deferred to 2007
6. Working time account as Life working time account	- offered, need for consultation with works council prior to larger-scale implementation
7. Workshop Work Life Management for 45+	- offered and likely to be continued
8. Individual coaching	- offered and to be continued
9. Wellness checkpoint	- offered and to be continued
10. Health care and sports programmes	- offered and to be continued
11. Eldercare	- offered and to be continued

It becomes apparent that most of the measures implemented will be continued in the future, others deferred to 2007 where these are likely to be offered again with a revised concept or approach. A third type of measures requires further consultations with the works council before these can be implemented at a larger scale.

Further outputs and results of the project included several dissemination activities and substantial contributions to the project's process model development activities.

2.3. Italian Active@Work sub-project

2.3.1 Introduction

The Italian sub-project aimed to develop a model of alternative working arrangements for older workers (called Seniority Social Certification) that could be adopted by enterprises to improve the quality of work of elderly employees and to promote active ageing at local level.

The three main objectives of the Italian sub-project were:

- the analysis of the local industrial scenario (the target area is Province of Lecco), of current trends and emerging issues;
- the identification of best practices at national level;
- the planning of a "*Seniority Social Certification*" protocol that should be allocated to the companies that show good practices in the improvement of the quality of work for elderly employees;

Italian sub-project was divided into 3 main macro-areas and in 6 operating actions:

- *Study phase* (Sept. 04 - Jan. 05)
 - Action 1: Analysis of the Lecco industrial scenario and literature review;
 - Action 2: Identification of the firms from which to select a group of workers;
- *Enquiry phase* (Jan. 05 – Jul. 05)
 - Action 3: Analysis of the selected group of enterprises and set of workers;
- *Project development* (Jul. 05 – Oct. 06)
 - Action 4: Identification of and learning from good/best practices in Italy;
 - Action 5: Development of training programs;
 - Action 6: "Social Seniority Certification" Planning.

The *first macro-area* included preliminary meetings with project partners and national stakeholders, the review of national and international literature and the analysis of the Lecco district industrial scenario. The main outcome of this action was to improve the research program and to define the set of workers and enterprises to be included in the enquiry phase.

During the *Enquiry phase*, the Italian workgroup implemented the enquiry system and research procedures. The program used both qualitative and quantitative methods: 160 questionnaires were submitted to a sample of elderly workers expelled from the local job market, while 200 questionnaires were submitted to a check sample, made up by active employees, embedded in the local job market. The research program aimed to collect information on specific work organization measures adopted by local firms.

Finally, the *Project development* area included the identification of good/best practices in Italy, the development of training programs and the planning of a *Seniority Social Certification* protocol. The Italian team developed the certification protocol, according to the indications gathered during the previous actions. This phase included also the mainstreaming of program results.

The project team in Italy consisted of four organisations: *Synergia*, a social research, training and consulting firm, operating since 1989 in the field of social and health policy; *Lecco Lavoro*, a public agency born in 2000, whose mission is the improvement of working conditions and human resources valorization in the Province of Lecco; the *Province of Lecco*, in particular the department for training, education and labour market, with the role of coordination of the training activities on the territory and *Network Occupazione*, an association that contributes to the development of work policies in the Lecco Province, made up by *Unione Industriali* (Association of Industrial entrepreneurs), *Associazione Costruttori edili* (Association of builders), *Associazione Piccole Medie Imprese* (Association of little and middle-sized enterprises), *Cgil* (Labor Union), *Cisl* (Labor Union), *Uil* (Labor Union), *UPAL - Unione Artigiani lecchesi* (Provincial Craftsmen Union), *ASCOM - Unione Commercianti* (Traders Union), and other local stakeholders. It is possible to consider Network Occupazione as the end user of the entire project.

All national partners were responsible for the leadership and the administration of the tasks assigned to them. In particular, Synergia had the leading role in the sub-project whereas Lecco Lavoro was in charge of the coordination of the relationships with local partners (as they work in the same area -Province of Lecco- and there is a consolidated cooperation experience among these organizations) in order to ensure a better administration of the local activities.

2.3.2 Activities undertaken in Italian sub-project

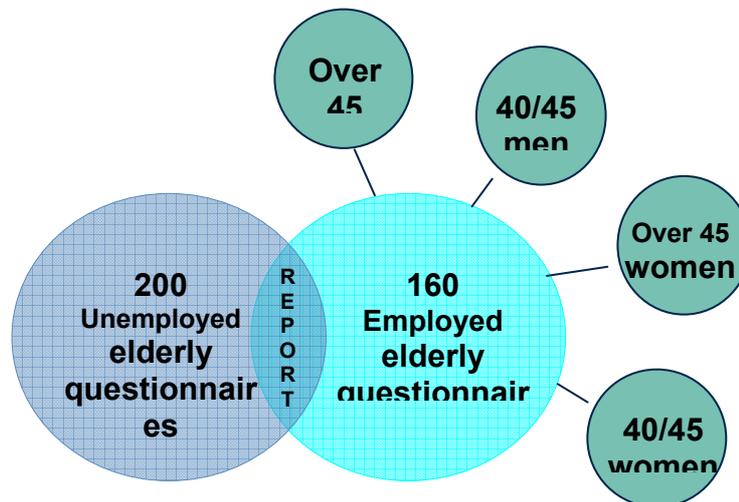
The first activity was to make an analysis of the Lecco industrial scenario and to conduct a literature review. The analysis is available in a chapter of the final publication. The purpose of these actions was to refine the Italian program phase, with the inclusion of local stakeholders' suggestions and indications from the literature as well as to choose useful methods and criteria for the collection of data and the selection of cases to include in the other workpackages.

The next task was to define the features of the sample to consider in the inquiry phase. The purpose was to identify criteria (i.e. the sample) and tools (i.e. questionnaires) to be used in the survey.

Two samples were chosen:

1. a group of *employees expelled from the local labour market* (and for this reason included in the employment agency list). The subjects included in this sample were divided, for research purposes, into two

- groups: employees between 40 and 45 years old (first group) and over 45 (second group);
2. a “check sample” composed by *employees embedded* in the local labour market. This sample was divided into the same age groups.



The sampling system adopted for the “check sample” was an “optimal allocation” system, which considers the same proportion of cases, in order to balance the characteristics of the surveyed group. The check sample was composed by 200 persons, while the interviews with the target subjects were 160.

Synergia and Lecco Lavoro developed two questionnaires (Annex 4 and 5) and other tools useful to implement the enquiry system. For instance, the questionnaire for employed elderly, was made up by 23 items. The questions were ideally divided in eight areas: 1) Identification information and professional curriculum; 2) Information about the last work done; 3) Job satisfaction; 4) Critical events (work accidents, contrast with direction, dismissals, family problems, ...); 5) How the employees reacted to the critical events; 6) Questions about professional and future ambitions; 7) Questions about ageing; 8) Questions about possible policies to be implemented in the enterprises.

The Analysis of the selected group of enterprises and set of workers started with the “field” work of the survey: the unemployed elderly were interviewed at the moment of registration to the employment agency list, where an “help desk” of Active@Work project was organized (200 questionnaires were filled in). Concerning the “check sample”, Synergia and Lecco Lavoro cooperated

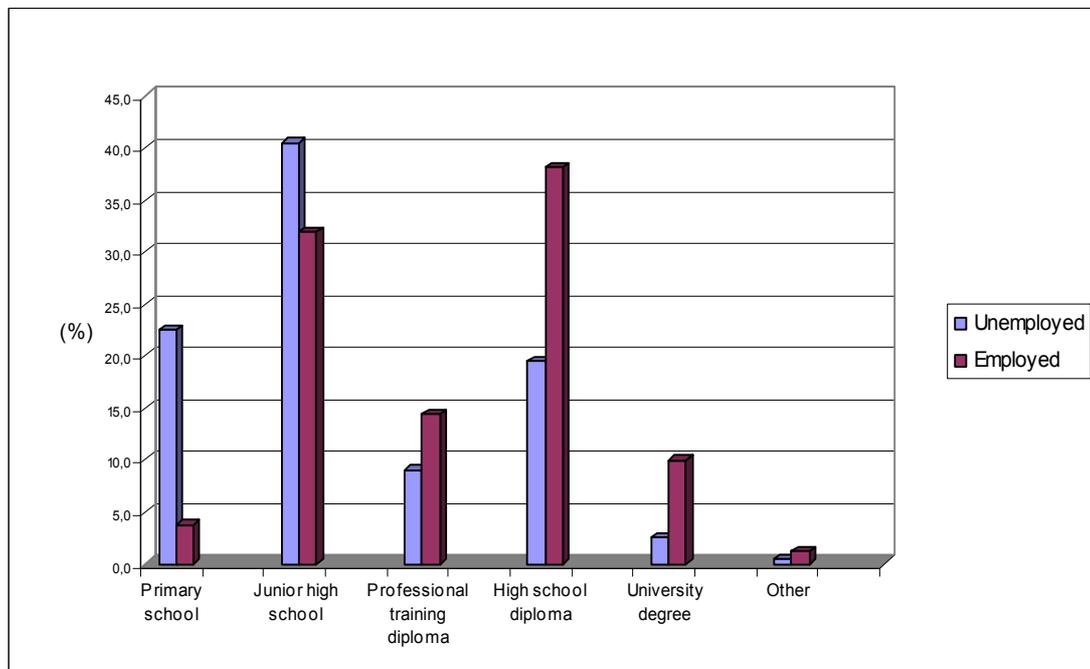
with Network Occupazione -in particular with trade unions- who entered in touch with the employees directly in the factories, for the face to face interviews. Trade union members who cooperated in the field work, had previously taken part in a training session led by Synergia.

Once finished the field work, Synergia researchers have:

- collected the questionnaires;
- inputted them and created a database, using an Access System program;
- analyzed the results obtained, using an SPSS System program.

The report with graphics, tables and comments has been inserted in the final publication as an autonomous chapter. Here only some parts of the report are presented as an example:

1. Education of employed and unemployed workers



2. Who does the labour market favour the most?

Who does the labour market favour most?	Employed (%)	Unemployed (%)
The young workers	78,7	78,9
The elderly workers	6,5	5,9
I don't know	14,8	15,1

Why the young workers?	Employed (%)	Unemployed (%)
Because they're "less expensive"	63,9	61,6
Because they accept precarious and temporary contracts	56,6	21,9
Because they're more educated and competent	23,8	13,0
Because they learn fastly	15,6	6,8
Others	0,8	2,7

3. Perception about ageing: "Is the age a limit for the jobseeking?"



4. Perception about time (employed workers)

If you should be dismissed, in how much time do you think you'll be able to find another job?		Over 45	40-45 years	Total
Few weeks	N	11	20	31
	%	14,7	27,8	21,1
Few months	N	17	27	44
	%	22,7	37,5	29,9
More than one year	N	5	5	10
	%	6,7	6,9	6,8
Maybe I'd have some difficulties to find it	N	42	20	62
	%	56,0	27,8	42,2
Total	N	75	72	147
	%	100,0	100,0	100,0

5. Perception about risks

The reason for elderly workers' problems has to be found in:	Employed (%)	Unemployed (%)
the international trade market crisis	39,1	54,5
the local companies' choices	58,3	42,4
others factors	2,6	3,0

6. Perception about potential policies

Policies	Employed (%)	Unemployed (%)
Mentoring	58,1	55,2
Part-time contract as transition to retirement	36,9	38,7
Redeployment	35,0	37,6
Taking part to training programs	28,1	26,5
Benefits linked to the development of new competences	23,1	18,2
Teleworking	5,6	8,3
Senior workers association	3,1	7,2
Others	0,0	5,0

The "enquiry phase" also included two Focus Groups with the "key informants": human resources personnel, entrepreneurs association members, Chamber of Commerce, Public employment agency, trade union activists

(CGIL, CISL, UIL), and other institutional representatives. The purposes of the Focus Groups were:

- to compare and validate the results of the survey with the opinions of other “key informants” (the questionnaires were addressed only to the workers, while the Focus group also to the other actors of the market);
- to collect more information about active ageing in the local context;
- to define new policies and innovative strategies.

A third Focus Group (a kind of workshop) was organized in November, in order to present the final results of enquiry phase to the stakeholder previously engaged in the Italian phase.

The research program aimed to collect information on specific work organization measures adopted by local firms. The evaluative conclusions has provided guidelines for the development of other actions.

The purpose of the action *Identification of and learning from good/best practices in Italy* was to analyze, describe and collect relevant documentation concerning best practices adopted at national level by Small and Middle Sized Enterprises in order to improve the conditions of work of elderly employees and to prevent early retirement of elderly employees. The best practices review includes policies like redeployment, e-working, job sharing, mentoring, coaching, job rotation, outplacement, outsourcing, change to non-profit, etc. The Italian workgroup created a format for the documentation collected, regarding specific cases and good practices of alternative working arrangements. The best practice review is also included in a chapter of the final publication.

In the beginning of the best practices analysis, the Italian workgroup developed the set of indicators that were later adopted as guidelines for the Seniority Social Certification.

The actions *Development of training programs* and “*Social Seniority Certification*” *Planning* were strictly connected. The training package developed aims to introduce the culture of “active ageing measurement” in a group of enterprises involved in the project at local level. So, the training package includes the necessary tools for the transference of the SSC guidelines in these companies, in order to test the model itself.

The package consisted of:

- a *workshop* with the representatives of Network Association organizations (responsible of the test in their enterprises), in order to present the work done, the tools and the aims of the process;
- a *training session* with the enterprise certification referee led by Network Occupazione;

- the *list of performance indicators* and a paper able to clarify their meaning and usage;
- a *CD-rom* with relevant documentation about active ageing policies.

Network Occuazione members were involved in the definition of the set of indicators in SSC model which was experimented and evaluated in a group of enterprises with the cooperation of the Network itself. Within this framework, training represents the context where the structural elements of the certification model were identified. On the methodological side, the involvement of stakeholders (identified with Network Occupazione) represents the opportunity for the development of the model of SSC to guarantee the suitability of the model to the local context and a true sharing of the model.

During the project period *Synergia* and *Lecco Lavoro* defined the Seniority Social Certification protocol. It stems from an analysis of CSR (Corporate Social Responsibility) model and was developed in several brainstorming sessions with Network Occupazione experts who validated the set of indicators elaborated by *Synergia* and *Lecco Lavoro*.

Seniority Social Certification (that isn't a certification, at the moment) represents a **self evaluation tool** that companies can voluntarily use to estimate their performances in the promotion of active ageing and to facilitate the development of new policies for enterprise management.

It is based on a voluntary approach because it concerns the basic purpose, orientations and choices (policies) of enterprises, which cannot be statutory or imposed: the SSC model can be considered a kind of map, a common reference framework for the enterprises at local level. This map is made up of a modular and flexible set of indicators, organized in a framework divided in:

1. **Dimensions**: dimensions of enterprises organization, i.e. Staff, Turnover and Administration;
2. **Categories**, thematic areas monitored by groups of indicators. There are 5 categories in the quantitative section: Human resources, Turnover, Training, Working schedule and Absences. Each of them is composed by indicators or groups of indicators. The 6 categories in the qualitative section are Turnover, Training, Incentive policies, Health and safety, Policies and Awareness.
3. **Indicators**, can be quantitative (in the quantitative form) and qualitative (in the quality form). The 74 indicators provide information concerning specific aspects of enterprise organization.

The model is composed by a "quantitative" and a "qualitative" section, strictly linked (Annex 6). The first form (tab. Nr. 1) represent a quantitative measurement table, able to define an empirical scenario of enterprises: the features of employees, the type of contract, the turnover flows, the number of

contract cessations, the training, are some of the items included in this table. On the other side, the qualitative form (tab. Nr. 2) asks companies the level of application of some policies in the enterprises context: i.e. the type of training implemented, Incentive typologies supported by the company, the health promotion activities adopted, the staff employment policies (like mentoring, outplacement, tele-work, the outsourcing, etc.).

Tab. Nr. 1 – Quantitative form

DIMENSION 1: STAFF			Total		of whom Over 45	
	CATEGORIES:		M	F	M	F
INDICATORS	1	Human resources				
	1	Category	Number by category			
			factory workers			
			office employees			
			Managers			
	2	Nationality	Nr. By nationality			
			Italian			
			European Community			
			Extra-European Community			
	3	Type of contract	Nr. For type of contract			
			Employees with no time limit			
			of whom part time			
			Fixed-term employees			
			of whom part time			
			Consultants			
			Temporary			
	4	Educational qualifications	Nr. by educational qualification			
			Primary school			
			Secondary/junior high school			
			Professional qualification			
		High school				
		Ba/Bsc				

DIMENSION 2: TURNOVER			Total		of whom Over 45	
	CATEGORIES:		M	F	M	F
INDICATORS	2	Turnover				
	1	Entrance flows	Number of hirings in the last five years			
			Employees with no time limit			
			Fixed-term employees			
			Other			
			factory workers			
			office employees			
			Managers			
	2	Exit flows	Number of exits in the last 5 years, retirements excepted			

		Employees with no time limit				
		Fixed-term employees				
		Other				
		factory workers				
		office employees				
		Managers				
3	Number of contract cessations	Number of exits by retirement				

DIMENSION 3:ADMINISTRATION			Total		of whom Over 45	
	CATEGORIES:		M	F	M	F
3	Training					
INDICATO RS	1	Nr. of training hours by category	Overall hours per year net of compulsory training			
			Factory workers			
			Office Employees			
			Managers			
4	Working schedule					
INDICATO RS	1	Overtimes	Average overall hours per year by category			
			Factory workers			
			Office Employees			
			Managers			
5	Absences					
INDICATO RS	1	Days of absence/ reason	Number of absences due to			
			Illness			
			Accident			
			Other			

Tab. Nr. 2 – Qualitative Form

Which staff recruitment criteria are preferred by the company?	not at all	a little	enough	a lot
Experience/ Expertise				
Labour cost				

Which are the training typologies adopted by the company for older workers?	not at all	a little	enough	a lot
Has the company started training paths for (technical and technological) skill maintenance in the last year?				
Has the company started in the last year training paths for specific skill development among individual workers or categories of workers?				

Has the company started training paths for the acquisition of new skills by individual workers or categories of workers in the last year ?				
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Which are the Incentive typologies supported by the company?	none	up to 10% of staff	up to 25% of staff	over 25% of staff
Does the company offer one-off economic incentives (money awards, extra allowances over minimum pay, etc.), whose allocation is based on a seniority criterion?				
Does the company offer company perks (inside parking, recognitions, inconsumable incentives etc) whose allocation is based on a seniority criterion?				
Are there predetermined career development (level upgrade, loyalty agreements, recognition, rank....) systems, based on a seniority criterion?				

Which forms of health promotion and protection for over 45 are adopted (except for obligations stated in act 626)?	none	sometimes	company policies under development	provided for by company policies
Does the company offer forms of health and/or social care for workers over 45 (screenings/check-ups, medical-specialistic agreements)?				
In the last three years, has the company realized actions for health promotion and maintenance for over 45? (agreements with gyms, promotion of healthy behaviours, ergonomics fitting of offices/work instruments, etc ...)				

has the company adopted in the last 5 years some of the next staff employment policies?	I don't know it	I know it but it's not used	I sometimes use it	It's part of the company's policies
telework				
Job shared by 2 workers - Job sharing				
switching to part time				
Support activity for the professional growth of a usually younger worker - Mentoring/Coaching				
Worker's employment in a new job inside the same company - Inside mobility/Redeployment				
Flexible Schedule				
Worker's switch to consulting, even though linked through a consultant contract				
Outplacement (of workers in excess)				
Outsourcing (of production activities - goods and services)				

Structured transition to non-profit fields (in Company Foundations etc ...)				
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What knowledge has and which tools does the company use with regards to its over 45 workers' situation :	none	sometimes	company policies under development	provided for by company policies
Does the company consider the involvement of senior workers in the management of staff policies through questionnaires and discussion tables, in order to gain a better understanding of age-related professional needs?				
Are there any forms of associationism among workers over 45 inside the company?				
In order to develop maintenance policies related to elderly workers, does the company know the number of years of contribution of its workers?				

Filled in by	
Did you have any problems in filling in the questionnaire? If yes, can you explain?	

When the enterprise responsible has filled the two questionnaires, the program (at the moment SSC model is hosted on an excel file) will automatically elaborate the data. The calculation matrix and the method used to elaborate the data of the tables (weights and indicators measurement system) are reported and described in the file attached (Annex 7).

The final output of the system is represented by a synoptic table (tab. Nr. 3) able to summarize the elaborated data, giving as a feed-back a synthesis of enterprise situation concerning the dimensions previously considered (turnover, training, incentives to maintenance, etc.), divided by gender and staff typology. The different colors of each cell illustrate the enterprise strengths and the elements of complexity: while the blue and the green color can be considered indicators of a good level of application of the policies considered (in relation with the incidence of over 45 employees), the yellow and the red color suggest that some problems are present in the management of over 45 employees.

Tab. Nr. 3 – Final output (an example)

	Over	Over Male	Over Female	Factory workers	Factory Workers Male	Factory Workers Female	Office employees	Office employees Male	Office employees Female	Managers	Managers Male	Managers Female
Turnover Indicator	Yellow	Yellow	Green	Yellow	Red	Yellow	Green	Yellow	Light Blue	Light Blue	Light Blue	Red
Training Indicators	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Red	Red	Red
Incentives to maintenance	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Light Blue
Health promotion and protection	Yellow	Green	Yellow	Yellow	Green	Yellow	Yellow	Green	Yellow	Yellow	Yellow	Yellow
Staff employment policies	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Light Blue
Awareness	Green	Yellow	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Yellow	Green

Other graphics and tables can be generated by the program. Some examples are reported in attachment (excel sheets named “qt graph” and “ql graph”).

Once defined the model and shared it with Network Occupazione members, SSC was tested in ten enterprises of the Lecco district¹, with the support of Network Occupazione. The experimentation forms are collected in Annex 8.

The pilot test allowed to assess a series of information concerning the SSC plan as a whole, with particular reference to the set of indicators. The following elements were discussed:

- how relevant they are with reference to the notion of SSC;
- how easy they are to understand by enterprises;
- how easy is to produce the information functional to indicators determination;
- how to collect and measure data;
- how enforceable is the protocol, in respect to different types of enterprises.

¹ The enterprises involved in the Pilot tests were: Aldeghi Luigi (metal and mechanics sector); Charles River (Chemical sector); Fimi S.p.a. (metal, mechanics and system sector); Fiocchi (metal and mechanics sector); Fonderia Mapelli (metal and mechanics sector); Gilardi Costruzioni (building field); I.me.co S.p.a. (building field); Mapelli Salvi (metal and mechanics sector); Officine Colombo (metal and mechanics sector); Tecnottica Consonni (ophthalmology field).

2.3.3 Future perspective

A part of the last meeting with local stakeholders in Lecco on 14 of September 2006 was dedicated to the discussion about futures perspectives of development of SSC in local context.

Moreover, during the last months of activities, other public subjects (the Departments of Work of other Lombardy Provinces) have shown interest in the application of the SSC protocol: at the moment, they are considering the possibility to engage in a new pilot test a bigger sample of enterprises. This action could contribute to improve the theoretical and the methodological basis of SSC model, moreover concerning the attribution of measures and the weight of indicators.

As previously underlined, at the moment the model represents a self evaluation protocol, based on a self-benchmark of the enterprises: starting from its structural features (surveyed by the “quantitative form”), a company is able to evaluate its own performances and to understand which are the elements of complexity. If the experimentations will be extended, more data will be collected (of different sized enterprises and located in a different geographical area) and it will be possible to create a common framework that will make possible a proper benchmark.

Another future perspective of the project refers to the development of a software system (instead of the excel program) able to better support the calculation matrix and to obtain a better output, i.e. a dedicated software able to solve the bugs evidenced by the excel program.

2.4 Dialogue Forums and Process Modeling

2.4.1 Introduction

Different kinds of Dialogue Forums were established in the project to intensify discussion concerning alternative work arrangements for aging work force. In addition to project partners, representatives from external organizations that is to say other stakeholders in each partner country e.g. national/local social partners, experts in the area of ageing workforce were represented in the Dialogue Forums which acted at two level, at transnational and at national level. The figure below describes the components of the Dialogue Forums.

Components of TDF



The members of the Dialogue Forums played an active role in the project by expressing their views and expectations about the progress and results of the project. The main function of the forums were to act as evaluation panels. The evaluative tasks of them included assessment of the generalisation and transfer potential of the results of the national sub-projects and of the process model which was developed by the project partners. The evaluation activities in phase 6, On-going monitoring and Evaluation, and in this phase were very closely connected. The main activities of the phase 4 are described in the figure below

Main Activities in Phase 4

Transnational Dialogue Forum	National Dialogue Forum	Project Partners
<ul style="list-style-type: none"> - to assess the transfer and generalisation potential of results of the three sub-projects - to assess the transfer and generalisation potential of the process model 	<ul style="list-style-type: none"> - to assess the transfer and generalisation potential results of the respective sub-project 	<ul style="list-style-type: none"> - to model the implementation process of alternative working arrangements

During the lifetime of the project there were three transnational dialogue forums which each was an open session where the external participants were invited by the hosting organisation. The dialogue methods used in the transnational forums were chosen by the hosting organisation and in national dialogue forums the most appropriate tools and methods adopted were chosen by National Facilitators including mainly meetings and workshops.

2.4.2 Activities undertaken

The first open transnational dialogue forum session, a half day session, was held in Lecco in Italy in October 2005 having twenty four participants. The forum's debate was preceded by an overview presentation about the Active@Work project and sub-project presentations including descriptions of experiences and results gained so far in the sub-projects. The topics of the discussion did not just limit to the results of the sub-projects, but the external members of the forum were also very interested in the grounding and starting points of the sub-projects like how the employees involved in the Finnish sub-project have been chosen or if there are any social partners involved in the German and Finnish sub-projects or if it is difficult to involve older workers to development projects in Germany and in Finland.

The second transnational dialogue forum was held at Continentale in Dortmund on 3 April 2006. The meeting was participated by a group of 31 persons from partner organisations and from some German external organisations. The objective of the forum was to present the three Active@Work sub-projects to the participating experts and to obtain their feedback and recommendations. The third and last transnational dialogue forum was arranged in Tampere in Finland in September 2006. It was attended by around 25 participants. The morning session consisted of presentations about Active@Work project and its sub-projects which were followed by 4 workshops about the dissemination and generalisation potential of the outputs and results of the project. A memo describing the discussion in each transnational dialogue forum was written afterwards.

The work of national dialogue forums started in Germany and in Italy in the first project year. The evaluative task of each national dialogue forum was to assess the main outputs or components of the output of the respective national sub-project. The main output and its components were defined by the sub-project leaders who also had assessed the transfer and generalisation potential of them during the 2 enquiry rounds included in the phase 6.

The main output of the German sub-project is concepts for innovative forms of employment for elderly workers and related necessary actions addressed to the ageing and workforce 50+ at Continentale, Deutsche Bank and SAP. The evaluative work of ten external experts in Germany started in September 2005 including validation of the measures and concepts (where appropriate) developed in German sub-project. They were also validated within the different user organisations in two iterations.

The experts received the full documentation of measures and concepts developed for the three user organisations and an overview of the implementation plans for those measures to be implemented within the duration of the project and those foreseen for implementation afterwards together with the literature study developed for evaluation and commenting. They made extensive use of this and several of their recommendations could be considered and incorporated into the implementation plans. These also included those recommendations given at the international TDF workshop held on 3 April 2006 at Continentale in Dortmund.

The main output of the Italian sub-project is Seniority social certification. During the whole project life-time the Italian work group has inaugurated an important dialogue with the stakeholders embedded on the territory and which are active in work policy and the job market. *Synergia* and *Lecco Lavoro* included *Network Occupazione* members in several brainstorming sessions to finalize the definition of the SSC model during the previous months. The meetings with the experts took place during January, February and March, for a total of 5 workshops and a final meeting for the summary of the results.

The group of experts validated the set of indicators elaborated by *Synergia* and *Lecco Lavoro*. A suitable analysis has been done for each indicator. The elements that have been discussed are:

- how relevant they are with reference to the notion of SSC;
- how easy they are to understand by enterprises;
- how easy the information functional to indicator determination is to produce;
- how to collect and measure data;
- how enforceable is the protocol, in respect to different types of enterprises.

During these workshops, the Seniority Social Certification has been defined.

The main output of the Finnish sub-project is concept and solution suggestions in Palmia. The Finnish national dialogue forum was arranged in the end of March 2006. The method applied in this session was a learning café type method. The topics of the dialogue focused on three outputs of the Finnish sub-project: self-documenting kits, persona descriptions and the concepts developed in the sub-project by that time. The main discussion topics were as follows:

- How do you think the output can be utilized?
- Which features of the output can complicate the generalisation and transfer potential? How can you develop the output to increase the generalisation and transfer potential?
- Which features of the output are innovative?
- Do you think the output can be utilized in other kinds of operational environments?
- Which features of the output contribute the transnational generalisation and transfer potential?

The session was attended by 17 participants, seven of them were not involved in the project implementation. A memo in Finnish describing the

dialogue in the session was written and delivered to the participants afterwards.

As one output of the project the enterprises has been provided with a model of implementation of alternative work arrangements for ageing and older workers. The Active@Work process model divides the promoting of active ageing at work into four clear phases and activities in order to help planning and implementing improvements in working conditions. Furthermore, the model provides practical tools and examples for development, implementation and evaluation of measures for active ageing at work.

The first tentative process model was drafted in Kick off meeting containing six steps. The next meeting dedicated to the modelling work was a half-day workshop organised in Lecco in October 2005 with fourteen participants. Some homework preceded the workshop. The purpose of the workshop led by University of Tampere was to exchange and to learn from each others experiences and to examine the implementation process in an enterprise context. During the workshop the participants worked partly individually and partly in two groups. The work shop resulted in two process models of implementing alternative work arrangements in enterprise context. A memo describing the activities and results of the workshop was written afterwards.

The concrete development of the process model of implementing alternative working arrangements was a shared task of the project partners so a work team of six persons was established in the end of the year 2005 including partners from Italian, German and Finnish partner organisations. The first results of the group's development activities were presented in the open session in Dortmund. The model and the publication which the model was originally planned to be included in were discussed more intensively next day by project partners. The partners agreed that it will be more useful to have the model in the web in hypertext format than to have it in printed publication. In addition to the hypertext format, the partners decided to provide a brochure (Annex 9) presenting the model in brief. The model in hypertext format is available in Active@Work website:

<http://www.uta.fi/tyt/kkp/projektit/activeatwork/processmodel/index.php>

2.5 Detailed account of the dissemination and mainstreaming activities undertaken in the project

2.5.1 Introduction

University of Tampere acted as Phase Leader in Dissemination and Mainstreaming phase. The Dissemination and mainstreaming plan for the project was created during the first reporting period. The document defined the overall goals, target audiences, activities and schedules of dissemination and mainstreaming.

The goal of dissemination in Active@Work was to facilitate the utilisation of the results of the project by providing regular information on the project progress, outputs and results to external target audiences. There are several levels of dissemination as dissemination for awareness, dissemination for understanding or dissemination for action. Dissemination in Active@Work can be defined to be dissemination for awareness and dissemination for understanding among our external audiences.

The external target audiences of Active@Work consist of employers' and workers' unions, researchers and experts working with development of working life, industry and business associations, public authorities at local, regional or national level and enterprises interested in promoting active ageing. These organisations and communities can act not only as multipliers of project results but also as disseminators of the results via the use of their current information networks and vehicles. The specification of a relevant target audience have been done separately to each dissemination activity.

Dissemination activities have been implemented during the whole project duration. The implementation was divided into four six months periods and the plans were updated during each period. Active@Work was a transnational project thus dissemination activities took place in three countries and were run by National Facilitators. Each dissemination activity required a separate communication strategy including the specification of a target audience and the message.

2.5.2 Shared activities during the project life-time

During the start period of the project, dissemination activities focused mostly on announcing the launch of Active@Work project to external audiences. Partners carried out this in the context of their normal activities and professional networks using their current channels of communication and information.

The project website was set up with it's own domain name for two years (<http://www.activeatwork.net>) providing access to internal and external sources. University of Art and Design was involved in the design of the structure and visual appearance of the website. In addition to UIAH, empirica and Synergia were also involved in developing the content of the websites.

University of Tampere was responsible for the technical implementation of the project website. The site includes a database which facilitates the maintenance of it. University of Tampere was responsible for the maintenance work including the updates of the content of the sites - new links and project documents about the progress made in Active@Work had been added every now and then during the project lifetime. The process model for development, implementation and evaluation of measures for active ageing at work was also published in hypertext format. The website will be available for two years after the end of the project in the server of University of Tampere.

In addition to web-site activities information on the project has been disseminated in other ways, too. Project material was available in the Employment Week, which took place on 5 - 6 June 2007 in Brussels. The project has also designed and visualised leaflets and brochures to support the dissemination activities and they have been of good use both in Finland and abroad e.g. Furthermore, Active@Work participated in two panel discussions, the first one held in the last Seminar of ESF Art.6 Project Promoters in October 2006 and the second in the conference on Senior Policy in Copenhagen in November 2006.

2.5.3 Activities undertaken in Germany

The major external dissemination activities in Germany started later in 2006 after successful implementations had been achieved. However, some external dissemination activities were implemented and carried out earlier, too. These included the provision of information at key events relating to the topic of the project and some brief presentations in events organised by MEPs in the European Parliament but also the inclusion of articles in newsletters such as the one of the "Silver Economy Network of European Regions" in August 2005.

The German Active@Work project was invited to and attended the European Parliament "Intergroup on Ageing" events on:

- "Opportunities and perspectives on Ageing in the EU: the impact of future Cohesion and Research Policies", 3 May 2005, Brussels
- "The Impact of Ageing on Demographic Change in the European Union", 29 June 2005, Brussels
- "Employment of Older Workers: examples of good practice", 20 September 2005, Brussels.

The project partners agreed on a dissemination strategy at the beginning of the project. This strategy was constantly refined and updated with several important achievements further described below which occurred in the lifetime of the project. These included the publication of project results in a key publication and a presentation of project results at a national key event:

- Publication in Personalführung 3/2006: "Älterwerden im Beruf bei SAP, Deutscher Bank und Continentale. Das Projekt active@work sucht Antworten auf das Altern der Belegschaften". Authors: Volker Hempel

(Continental), Norbert Kordey (empirica), Hermann Maaß (Deutsche Bank), Gabriel Wiskemann (SAP)

- The Active@Work project was presented with a keynote speech at the national conference on "Accept the Demographic Challenge" which took place from 6 - 7 April 2006 at the Ludwig Erhard Haus in Berlin. The keynote speech was entitled: "High Tech and High Age - Diversity in the Organisation of the Future. Why a »Young Organisation« Will Soon Have to Care for the »Older«" by: Dr. Gabriel Wiskemann, Head of Compensation & Benefits Germany, Human Resources, SAP AG und Heidrun Kleefeld, HR Compensation and Benefits, Shared Services Germany, SAP AG.
- Regular publications in company newsletters and other publications at SAP and Continental.

Further publications and presentations at events are planned for after the lifetime of the project in addition to the overall project publication.

In addition, a German TV station has approached the project to identify possibilities for developing a TV spot for an economics magazine in which the approach and results of the German sub-project will be communicated.

Also Bosch-Siemens and the truck manufacturer MAN have approached the project asking whether they could join in and participate in the project. After some discussions, an agreement has been reached with them that they are now exchanging experiences with one of the three German active@work user organisations which are likely to help them in developing appropriate measures for an ageing workforce on their own.

2.5.4 Activities undertaken in Italy

Concerning dissemination and mainstreaming activities, the Italian workgroup has developed some actions which aim to make the project results more widely known to the public at local and national level and to better involve the local stakeholders into Active@Work activities.

The dissemination activities of the Sub-Project that have been developed include:

1. announcing the launch of Active@Work project in Synergia monthly newsletter (named "Mutamento Sociale") in order to reach potential new stakeholders (public agencies and private companies). Mutamento Sociale mailing list includes more than 2.900 mail addresses;
2. announcing the launch of Active@Work project also in Synergia website (www.synergia-net.it);
3. the presentation of the SSC model to other public agencies (i.e. Labour policy agency of Province of Milan);

4. the participation of Network Occupazione members to the TDF in Italy (on 3rd of October 2005) and in Finland (on 26th of September 2006): the open TDF aimed to better involve local partners in the project;
5. the participation of local stakeholders in the final workshop in Lecco on 14 of September 2006;
6. the publication of a book ("Active@Work. La certificazione Sociale di Anzianità Aziendale in Provincia di Lecco") in print form with FrancoAngeli editor.

The book includes an overview of Active@Work project (Finnish and German partners have cooperated in the first chapters), a description of ageing policies in national context, an overview of Province of Lecco labor market, the outputs of the survey conducted in Lecco Province and the model of SSC. This is the book index hypothesis²:

"Active@Work"

La certificazione Sociale di Anzianità Aziendale in Provincia di Lecco

Introduzione. Il Fondo Sociale Europeo, l'articolo 6 e Active@Work
(by *Maritta Harjunpää*, University of Tampere)

-
1. Strategie innovative e Accordi di Lavoro Alternativi per i Lavoratori Anziani, una Forza Lavoro di Età diversa e la promozione dell'invecchiamento attivo.
(by *Werner B. Korte*, Empirica, Bonn)

 2. Agevolazioni lavorative individualizzate per il personale che invecchia
(by *Tuuli Mattelmäki, Kirsikka Vaajakallio and Salu Ylirisku*, University of Helsinki)

 3. Le politiche di Active Ageing nel contesto italiano: buone pratiche a confronto
(by *Alessandro Pozzi e Giuliano Paterniti*)

 4. Lavoratori anziani tra strategia europea e politiche territoriali
(by *Paola Cambiago*)

 5. L'invecchiamento attivo nel mercato del lavoro lecchese: i risultati delle rilevazioni
(by *Rebecca Zanuso e Giovanni Viganò*)

 6. Il Modello di Seniority Social Certification
(by *Maurizio Betelli and Rocco Briganti*)

² An agreement with the editor has already been reached and the book will be finished in the next few days.

The book will be printed in 300 copies and will be distributed among the partners. Mainstreaming will also include a distribution of the book to the Department of work of various Italian Provinces.

2.5.5 Activities undertaken in Finland

The first Active@Work seminar in Finland was arranged in May 2005. The theme of the seminar was chosen to be "Ikä on voimavara työelämässä – Use It or Lose It!" (Age is a Resource in Working Life – Use It or Lose It!). It was a half-day event with 6 speakers and gained totally 63 participants. The second Active@Work seminar (Työ iän tasalle! - Age-fitting Work!) in Finland was held in September 2006 and gained around 35 persons. The half-day event was Active@Work closing seminar where the main results of the project were presented. The main results were also presented in an inter-organisational event by University of Tampere in November 2006.

During the spring 2006 University of Tampere organized series of four lectures. The main theme of the lectures was challenges of ageing in working life from an individual's and organisation's point of view including concrete, practical speeches by experts about developing working conditions.

Finnish Active@Work partners have also attended seminars, conferences and other events, the topics of which were related to the content of Active@Work. Tuuli Mattelmäki attended the international *Include* conference in Helen Hamlyn Institute at Royal College in London in April 2005. The conference was an opportunity to network and gather insights about studies and methods related to Active@work objectives. Mattelmäki's article, which was written together with Maarit Wiik from Sito Consultants, is titled "Inclusive suburbs – a case from real life" and it was published in conference proceedings (available in

http://www.hhrc.rca.ac.uk/programmes/include/2005/proceedings/pdf/mattelm_wiik.pdf). Furthermore, the UIAH team has presented the project and the approach in three different settings at Helsinki city organization. It has also been presented in companies and in various seminars and lectures given by Mattelmäki and Ylirisku to audiences in Helsinki and abroad e.g. in the University of Southern Denmark in September. In August 2006 Tuuli Mattelmäki and Kirsikka Vaajakallio (née Lehtonen) presented their article titled Designing alternative arrangements for ageing workers at global audience in *Participatory design* conference in Italy. (The article is available in http://designresearch.uiah.fi/img/publib/mattelm%20E4ki&lehtonen_pdc_fin.pdf)

In October 2006 Tuuli Mattelmäki defended her doctoral thesis titled Design probes. Both the book and the defense discussion included examples from the Active@work –project. (The book is available in <http://www.uiah.fi/page.asp?path=1866,1919,4461,6561,6566,25872>)

2.6 Project management and co-ordination

2.6.1 Introduction

The leader of the phase was the Promoter, University of Tampere. The objective of the phase was to produce an integrated project partnership among the co-operating organizations and groups involved in the project to efficiently and effectively achieve the project goals. The project promoter and the partners agreed on the correct management structures for dialogue and decision-making in the Partnership Agreement which was signed by all partners during the first project months.

The strategic direction and supervision of the project was taken care by the Steering Committee consisting of the representatives of all project partners. The Steering Committee held five meetings during the project life.

The Executive Team in Active@Work was composed of the Promoter and Sub-Project leaders. Sub-project leaders were empirica in Germany, Synergia in Italy and University of Art and Design (UIAH) in Finland. It took care of the preparatory work for the Steering Committee, the execution of its decisions and ongoing monitoring of the technical implementation of the project. The Executive Team didn't have any meetings during the lifetime of the project because most issues were well taken care via email discussions.

A National Facilitator organization nominated in each participatory country to act as a contributor and national contact point. The Facilitator organizations were empirica in Germany, Synergia and Lecco Lavoro in Italy and University of Tampere (UTA) in Finland. National activities in each country were co-ordinated by the National Facilitators. National Facilitators could also act as an interface between the partners located in the same country and the Promoter e.g. the partners in Germany made such an agreement.

Sub-project Leaders were responsible for the implementation of the sub-project and monitoring of its progress. The project had also four phases that did not have the status of a sub-project. Those phases were lead by Phase Leaders who had similar responsibilities as the Sub-project Leaders so they carried responsibility for steering the work in their respective project phase, consolidate reports and encourage collaboration between partner organizations involved in the project phase.

The main activities in the phase can be summarized to have been

- To conduct the Steering Committee meetings to agree upon the project work plan and the detailed work plans of its seven phases, to assess progress, track time-lines and discuss upcoming activities.
- To prepare the six-monthly reports to the Commission
- To take care of the transfer of the Commission payments to the partners and to monitor the cash contribution payments of the partners

- To work with National Facilitators, Sub-project and Phase Leaders to assure project co-operation and implementation
- To communicate with the Commission in case the project experiences problems

2.6.2 Undertaken activities during project lifetime

The Active@Work-project had five Steering Committee meetings. The project kick-off was organized in Finland in December 2004. The purpose of the two-day meeting was to get to know each other and to define the work plan of Active@Work. An additional Steering Committee meeting with five participants, a telephone conference, was held in June 2005. The main reason for the meeting was the need to change the project internal reporting timetable. The third Steering Committee meeting was held in Lecco, in Italy in October 2005 and the next meeting in Dortmund in Germany in April 2006. Summaries of upcoming activities of the seven project phases were gone through in the meetings to establish the project work plan for the next six months and to assess the progress made in the project. The last meeting was in Tampere in Finland in September 2006. The main objective of the meeting was to confirm the results of the project. The partners spent also time discussing the plans for further dissemination activities and continuation of the collaboration after the project life as well as the lessons learnt in the project. The minutes of the five Steering Committee meetings have been approved by the Steering Committee.

The project has provided the Commission with the six-monthly reports which have been approved by the Steering Committee. The promoter has accomplished also tasks related to the payments. The promoter transferred Commission's first and second pre-financing payments to the partners. The balance payments took place in January 2007. The cash contribution payments have been taken care of by each project partner.

At the sub-project and phase level the leaders of them were in control of implementation of the activities included in the respective phase or sub-project. Methods were selected by the phase/sub-project leaders according to the needs of the respective sub-project and phase.

3. Account of the on-going monitoring and evaluation

The general objective of the Phase 6 On-going Monitoring and Evaluation was to pro-actively assess and assure the advancement and results of the project. The evaluation was implemented in the participative convention: all partners produced data for overall project evaluation and were involved in the drawing of evaluative conclusions in Transnational Dialogue Forum and/or National Dialogue Forum. The evaluation took place in national and transnational level and project consisted of two parts:

1. On-going monitoring of the project performance
2. On-going effectiveness evaluation of the project

3.1 On-going monitoring of the project performance

3.1.1 Monitoring of the implementation of the detailed implementation plan of the project

The objective was to ensure the relevance, timeliness and efficiency of the project activities. Phase-specific, organ-specific and partner-specific task assignments, milestones and scheduling were monitored both in national and in transnational level. Methods of the on-going monitoring of the project performance were financial reporting, monitoring of the implementation of the detailed implementation and plan updates of the detailed implementation plan. Many of the tasks related on the monitoring of the implementation of the detailed implementation plan took place continuously almost on daily basis.

In **sub-project level** all partners took care of continuous monitoring of their own activities and produced and recorded data for overall project evaluation and reporting. Phase/Sub-project leaders were on the control of overall implementation of the tasks included in the respective Phase/Sub-project. All sub-projects ran on schedule and according the work plans approved by the Steering Committee, there were no crucial delays or other difficulties to report.

In the **transnational level** the monitoring was based on the work plans of all project phases and reporting requirements set by the Commission. National facilitators and the promoter monitored that the country-specific responsibilities related to transnational activities were taken care. The experiences gained from the monitoring were twofold: activities within the sub-projects took place timely and only minor adjustments to the time-scale were needed. All partners took care of the sub-project tasks assigned to them and usually within the budget frame. Few partners exceeded their budget, but they increased their own investment to the development work accordingly. Meanwhile, during the early project life activities common to all partners (such as contractual documents, evaluation documents and financial reporting documents) were sometimes incomplete or submitted after the dead line. This caused some delays in project performance, especially in phase 7 Management. However, these problems were solved and thus the common activities ran smoothly later during the project life.

3.1.2 Monitoring of the factors that advance the use, maintenance and sustainability of the project outputs and results after the project period

The objective was to promote the exploitation and sustainability of the project's outputs and results after the project period. Data collection focused on the main outputs of the sub-projects³ and consisted of three enquiry rounds. The first questionnaire round took place in the beginning of year 2005, the second round took place a year later and the final round at the end of the project life. The questionnaire covered 5 sets of factors: institutional factors, economic factors, social and cultural factors, upkeep and maintenance and choice of technology related to the outputs and results of the project. Sub-project leaders and representatives of the end-user organisations answered the questionnaire separately. The respondents assessed in which extent the propositions in each set of factors were true with the main output of the sub-project. The scale of the answers was from 5 = Completely to 1 = No relevance. The charts presenting the propositions and the comparison of the answers are in Annex 10.

Institutional factors such as distribution of responsibilities and involving target groups to planning, decision-making and implementation were quite clear to project partners since the beginning of the project and the number of "completely" or "mostly" answers even increased towards the end of the project life. The same kind of increase happened with the proposition about assuring the participation of interest groups that produced some "not at all/I don't know" answers in the beginning of the project.

The economic factors concerning long-term use of the outputs such as long-term costs and source of financing were not as clear as institutional factors to the respondents. The most common answer in early project life was "Somewhat" and none of the respondents answered "Completely". User organisations were more aware of economic factors than the sub-project leaders. However, the knowledge about the long-term costs caused by the outputs increased as the development process of the outputs got closer to the completion.

The propositions in social and cultural factors concerned issues like approval by the target and interest groups, communication with target and interest groups and consideration of gender roles. Just like with the institutional factors, propositions concerning the involvement of interest groups caused most uncertainty. On the other hand, the social and cultural factors related to

³ The main outputs selected by sub-project leaders:

- German sub-project: Concept for innovative forms of employment for elderly workers and related necessary actions addressed to the workforce 50+ at SAP, Concept for innovative forms of employment for elderly workers and related necessary actions addressed to the workforce 50+ at Continentale and Concept for innovative forms of employment for elderly workers and related necessary actions addressed to the workforce 50+ at Deutsche Bank
- Italian sub-project: Seniority Social Certification
- Finnish sub-project: Concept and solution suggestions in Palmia

direct beneficiaries and gender issues were paid attention very well right from the beginning of the project.

The propositions concerning the choice of method of the implementation of the output included technique, technology and other elements needed in exploiting the output. Answers concerning the choice of method indicated again, that attention had been paid to end users in the planning and development of outputs. The generalisation potential and possibility of further development of outputs had also been considered. Less attention had been paid to explore alternative implementation methods, as many issues have already been decided in the proposal phase of the project. There were no significant differences between the answers in the beginning and the end of the project.

The propositions concerning the maintaining of the output (such as distribution of responsibilities in long-term use and need for training and upkeep) were the most unclear set of factors in the early project life. This was understandable, as the project was in very early stage when the first questionnaire round took place and the development process of the outputs was ongoing. The situation improved as the project matured and “mostly” was the most common answer given in the last questionnaire round.

All in all, both the sub-project leaders and user organisations considered the issues related to the long-term use of the outputs already since the beginning of the project. Lots of attention was paid especially to direct beneficiaries’ needs and abilities. The dialogue and communication between sub-project leaders and user organisations worked out well as the responses of the both parties were usually very similar to each other.

3.2 On-going effectiveness evaluation of the project

3.2.1 On-going effectiveness evaluation in sub-project level

The objective was to ensure the effectiveness of the project activities through assessment of the enterprise-specific, regional or national usability of the outputs and the results of the sub-project. The method of the evaluation of the effectiveness of the sub-projects’ outputs were tests and pilots of concepts of alternative working arrangements implemented in sub-projects. Planning, data collection and other evaluation activities were executed by sub-project leaders and the outputs and results are evaluated by National Work Groups, pilot organisations and end-users. Pilot organisations and end-users assessed the workplace- or enterprise-specific effectiveness of the sub-project interventions and national work groups assessed the generalisation and transfer potential of the sub-projects’ results in national level.

Evaluation activities in German sub-project

The concepts and measures developed in and for the three user organisations SAP, Deutsche Bank and Continentale were thoroughly reviewed by the project team supported by the ‘Transnational Dialogue

Forum' (TDF) – and advisory board of experts - throughout the entire piloting process. Workshops with all three user organisations were organised where progress reporting and an exchange of experiences took place, and the work plans discussed, refined and agreed on.

In addition, the German partners decided for an evaluation in the different user organisations using a standardised instrument (questionnaire and interview guide) addressed to employees (staff members from the operational units, personnel department and superiors/management staff) and an interview guide for open interviews with top managers from the personnel departments. It was also decided to carry out an evaluation at two different points in time: a zero measurement prior to the implementation of new measures and a late evaluation approximately half a year later to allow for a comparison of the situations before and after the implementation.

The evaluation work started in late 2005 with the methodology and instrument development followed by the zero measurement in all three user organisations. The project partners:

- developed a concrete work plan with clear targets to be achieved and an associated timetable for all evaluation phases of the German sub-project
- monitored work progress in the 'problem specification' and 'concept development' phase against specified targets
- developed an appropriate approach and methodology with the associated instruments for the evaluation of the 'implementation' phase
- developed a work plan and timetable for the execution of the evaluation work in the 'implementation' phase
- carried out the zero measurement before the start of the partial 'implementation' phase
- carried out a late evaluation towards the end of the project in September 2006.

The zero measurement was completed and an analysis report written for each of the evaluations in the three user organisations in the form of a chart report in December 2005 (Deutsche Bank), April 2006 (Continental) and May 2006 (SAP).

The evaluation work details and time schedule of the zero measurement at the three user organisations can be briefly described as follows:

			
Interview type	<ul style="list-style-type: none"> ▪ eQuestionnaire mailing, ▪ interview guide 	<ul style="list-style-type: none"> ▪ Paper-and-pencil questionnaire, ▪ interview guide 	<ul style="list-style-type: none"> ▪ Online questionnaire in Corporate Portal ▪ interview guide
Personnel	<ul style="list-style-type: none"> ▪ Staff members 	Staff members and	<ul style="list-style-type: none"> ▪ Staff members

involved	from operational units ▪ Superiors	superiors aged 35 to 65	▪ Personnel staff ▪ Superiors
Sample size	256 (197 staff members, 59 superiors)	1600	407 (148 personnel staff, 36 Senior Council members, 243 superiors of which 114 are 50+)
Start date	1.3.2006	12/2005	22.3.2006
Deadline	15.3.2006	20.12.2005	29.3.2006
Return rate	Staff members: 94 = 48% Superiors: 43 = 73%	>600 = 40%	239 = 51%
Chart report delivery	2.5.2006	Spring 2006	1.6.2006

Conclusions

In September 2006 the late evaluation phase took place which will allow for a comparison of expectations and attitudes of the different target groups before and after the implementation of the measures. At the time of writing, this is still in progress. Due to confidentiality agreements with the three user organisations and data security reasons the results of each evaluation have been classified as “confidential” and can not be made publicly available.

All objectives set as targets at the German sub-project start have been achieved. But with respect to some issues the project was more optimistic than it turned out to be in reality. This for instance relates to the whole area of awareness raising and motivation of necessary stakeholders in the organisations. More effort than originally planned had to be invested in these activities to ensure full goal achievement. This was to some extent compensated by the fact that in other areas the work could proceed surprisingly more smoothly than expected (e.g. development and implementation of health management related measures).

It quickly became apparent that right from the beginning the support from the top-level management in an organisation is a must to be successful with any type of innovation development and implementation in the personnel area. Fortunately this was the case in two of the German user organisations which eased the execution of the whole process in the German sub-project in these cases enormously. Only in one case it became available somewhat later and slightly slowed down the work in the beginning.

As already indicated above, the need for spending substantial effort and time for awareness raising activities at different levels was underestimated but is crucial to end up with a successful project. Especially among superiors and managers but also among staff members in the operational units and irrespective of age of the target groups the project had to spend significantly more effort on awareness raising and motivation activities than originally planned to create the necessary preparedness and willingness of the relevant stakeholders to actively participate in the project. This experience received confirmation from similar experiences in comparable projects in other large

corporations with which cooperation for information sharing and exchange were established in the course of the project but also from the TDF experts when reviewing the project.

In hindsight it became clear and obvious that the Active@Work project has significantly contributed to the necessary awareness raising at all levels in the three user organisations. This is seen as one of the key benefits of the project by the responsible managers and decision makers in these organisations. They clearly state, that the prerequisites for further promising and most likely also successful implementation work addressed to the older and ageing workforce in their organisations are now in place as are first implementations of measures developed within the Active@Work project.

Right from the beginning the project team decided for a thorough evaluation of measures planned and implemented in order to receive some feedback on plans and implementations but also get some guidance for the future implementation activities. The results from the evaluation have clearly pointed to areas where specific measures planned for implementation or implemented are already successful or likely to be successful in the future. These include for instance measures in the area of health management, management workshops to achieve the necessary sensitisation and motivation of superiors for the topic to name just a few. However, it also revealed – and this came as a surprise to the project team – that there is a lack of demand expressed by staff members for some measures as for instance for eldercare offers.

The evaluation activities also helped to identify further needs in relation to specific offers addressed to older workers as articulated by the employees. This includes the wish for some sort of job rotation and new career paths for older workers interested in stepping back a bit in their work, specific health check programmes for executives, the targeted recruitment of older workers and some sort of parenthood model of older and younger workers to name just a few.

As could be revealed in the evaluation exercise, the sub-project met the needs of those to whom it was addressed. This includes the three organisations themselves as the primary target groups, the personnel departments as secondary target groups and the employees 50+ but also younger employees at these organisations as the tertiary target group.

The approach taken and the process developed for the development of measures and concept, and the subsequent implementation and evaluation by the sub-project seem to have worked well in all user organisations. It was fully in line with the organisation culture and also therefore turned out to be successful. The approach and methodology taken was developed in a generic format to ensure that procedures and processes in all three user organisations were comparable. This also eased the supporting function and work of empirica.

The Active@Work project has paved the way to further activities in the area of the project in all three German user organisations and the work started will be continued in the future. The three user organisations have gained a lot of experiences in piloting and experimenting with innovative forms of working addressed to older workers and - after successful pilot projects - stepwise transferring these into the general work flexibilisation offers for their staff members. The user organisations are committed to continue with the implementation of the developed measures after the lifetime of the project and will continue with the implementation of those measures for which – according to the evaluation - a demand exists. Several of the measures implemented or going to be implemented will become mainstream activities and “normal” offers for the workforce in these organisations in the future. Where appropriate, these activities will be merged or integrated with other personnel programmes addressed to the same target groups. Other offers developed in Active@Work, which turned out to be less in demand will again undergo a critical review and if needed be adapted or further developed to better fit the needs of the target groups.

Bearing in mind some of the experiences made in the active@work project, further implementations of new measures and concepts will in the future be carried out more rapidly than in the active@work project. The aim will be to achieve a full implementation of a measure in approx. 3 months. Otherwise implementation projects are running the danger of failure since the necessary human resources within the personnel department and the operational units where these are going to be implemented will be taken away due to other pressing demands on these actors.

It also became apparent that an even better integration of the topic of “innovative forms of employment for elderly workers and active ageing in employment” in the mid term company HR strategy and vision would be highly appreciated and would ease the whole process. The aim should be to even make the topic an integral part of the “Corporate Social Responsibility” strategy to even more convincingly demonstrate to the public that the organisation is fully committed to this subject. These are issues the three user organisations are also going to consider in the near future to ensure that they will be able to most appropriately address the future challenges resulting from the demographic changes and developments and remain to be an “employer of choice”.

Evaluation activities in Italian sub-project

The evaluation of Italian sub-project was done at the territorial level, the partner level and the scientific board level. At territorial level the evaluation was conducted as the “joint planning” with local stakeholders and user organizations. Network Occupazione members and other local stakeholders were involved in the decision process at different stages, both in the definition of the Seniority Social Certification model and in its validation at territorial level. Moreover, Network Occupazione was involved also in the “survey phase”, keeping in touch with senior employees in order to submit the questionnaires in enterprises context.

At partner level the final part of all national meetings was dedicated to the evaluation and on going monitoring of the project life, in particular the methodology adopted, the usefulness of activities, the efficiency and the output developed, in order to plan possible improvements and to increase the integration of single actions reaching a better level of comparison among the results. The participation of Network Occupazione members to the Open TDF in Varenna and in Tampere was significant in this respect.

The scientific board (*Luigi Mauri*/Synergia director, *Maurizio Betelli*/ Lecco Lavoro director and *Alfredo Marelli*/Councillor of training, education and labour market of Province of Lecco) evaluated periodically the implementation and the performance of the Italian sub-project, analyzing the activities developed, the methodologies adopted, their efficiency and the outputs. The scientific board used qualitative methods (peer review) based on the competences and on the know-how of board members, experts of different fields and actions (research, work policies, and administration capacities, etc.) Finally, in order to improve the methodological bases of final output, the SSC model was tested in 10 enterprises of Lecco District. These experimentations allowed a better balance of the self-evaluation tool.

Conclusions

The approach of joint planning at territorial level produced two important effects: 1) a better connection between local actors and Active@Work objectives that was useful to improve the attention on active ageing problems and 2) a way to identify and discuss new policies and innovative strategies. The Italian work group inaugurated an important dialogue with the stakeholders embedded on the territory and active in work policy and in the job market.

The evaluative discussions in the scientific board about the SSC model identified potential problems and balanced the project activities. They allowed to focus to the elements of complexity and the possible problems in the long term management of the SSC. The main elements of complexity that have been identified can be summarised as the following:

- The pilot test involves only ten enterprises: a further experimentation would allow to collect more data about companies features in order to create a common framework that will make possible to have a real benchmarking (and not only a “self-evaluation” tool);
- A certification model should not work on a local level only: in a “global market”, a certification emitted by a local authority (i.e. Province of Lecco or Network Occupazione) is not so appealing. A further development could be the integration of some SSC indicators in an official certification tool, such as the CSR;
- The SSC model needs to improve its theoretical and methodological basis: a further experimentation (even in other industrial context) could improve the methodological basis, moreover in the attribution of measures and weights to the indicators: the model represents a self evaluation protocol,

based on a self-benchmark of the enterprises, and not a real certification tool.

- The Excel program produced some bugs. Another future perspective of the project refers to the development of a software system (to replace the Excel program) able to better support the calculation matrix and to obtain a better output. A dedicated software would allow to solve the bugs evidenced by Excel program.

Evaluation activities in Finnish sub-project

The Finnish sub-project Konkari approached the phenomena of ageing workers' wellbeing with an exploratory design attitude. During the project the team and the workers experimented tools and methods to enhance discussions, express individual point of views and to co-create solution suggestions. The way of working such as various workshops, deliverables, visual illustrations and video-presentations have been innovative and thus also challenging. Based on the results and comments from different participants and experts this approach has created successful results and the tools and the emphasis in individual perspective could also be applicable in other contexts.

The sub-project specific evaluation in Finnish sub-project took place in two ways complementary to each other:

- 1) The process of activities, the methods and concept solutions were evaluated by and with the target groups in order to gain assessments from the end user point of view.
- 2) The study findings and concept solutions were evaluated collaboratively with target organisation and sub-project partners.

The main part of the evaluation in the Finnish sub-project took place in the user centred concept design process, which included evaluation and iteration⁴. The interpretations and concept ideas were presented to the ageing workers in various workshops to allow evaluation and iteration. Furthermore, interaction with partners and target organisation was emphasised to ensure that their interests were included in the seeking of solutions. These qualitative evaluative activities were thus an integral part of the concept design of the working arrangements conducted in phase 3.

During the process sever steps were taken to enable evaluation. The focus group and workshop summaries were distributed to the participants with an invitation for comments. The interpretations made based on the probes material were discussed in interviews. The persona interpretations were commented by the participants. The aging workers were able to vote for the most potential concept design frames proposed by the UIAH researchers and

⁴ In user centred design the users' perspective is the starting point for concept development. According to this the dialogue with the users should be done early in the process and it should continue throughout the process. The participatory process ensures that the target groups are taken into the research, interpretation and ideation as active partners.

comment the concept solutions. The ageing workers had an important role in co-designing sessions in concept design phase. Furthermore, in the various workshop partners' perspectives were also gathered and their expertise was utilised during the brainstorming.

The sub-project generated a great number of alternative ideas, and the most potential were selected to work further. The iterative process can be described as continuous dialogical learning activity on behalf of the researchers, as well as the ageing workers and their superiors. Most of the ageing workers were actively involved in the project and willing to share their experiences in the project.

In addition to participatory evaluation by target groups, the success of the project outputs and the process were evaluated by directors and key persons of the pilot user organisation Palmia. The relevance of the findings and solution suggestions were measured with questionnaire in spring 2006 by UTA. The questionnaire was addressed to Palmia strategic management, human resources, and the target group, the ageing workers.

Conclusions

The main objective of the sub-project was to enable and support individual workers' sustainable well-being and motivation to work longer. The work was divided into three sub-tasks: 1) to gather a holistic understanding of ageing workers' individual needs, attitudes, motivations, working practices and environments, 2) to identify potential improvement opportunities and 3) to develop concept proposals to support individual working abilities and motivations. Furthermore, narrative and visualised descriptions of the work and the workers were aimed to fuel a dialogue within and outside the target organisation. All these objectives were achieved.

According to the questionnaire in spring 2006 most of the ageing workers considered that the project had a positive effect to their motivation to keep up their working condition and to develop their own working practices and even to the attitude of keep working longer and avoid early retirement. 70% of the ageing workers and the management saw that the project had positive influence in the collaboration and knowledge transfer in the organization, in the readiness to try new methods and practices of working, and moreover, in the way new technology could be applied and used at work.

There were and will be challenges however, in the implementation of development ideas in the target organisation after the project. The organisational changes and changes of the contact person had some affect into the smooth collaboration. The CEO of Palmia supported the project considerably and his vision of the future created great expectations to the future implementation. His sudden death in the end of the project was extremely sad and will cause new changes in the organisation and its priorities. How these will affect the good will of implementing the results is unclear.

The Finnish sub-project allowed learning from many perspectives. The project pioneered in applying user-centered approaches in mapping the phenomena of individual well-being and ageing at work. During the process a rich amount of larger and small but meaningful problems, needs and desires were identified, documented and brought into the discussion. The sub-project started reflections about the potential of user-centered and design-oriented approaches in new fields such as in organizational development and creating innovative practices. These reflections are linked to a wider discussion about expanding the role of design.

Creating forums for interaction, reflection and ideation among different stakeholders during the project was mostly experienced valuable by the participants. Both the workers and the head of Palmia found the project positive, refreshing and the way it has been carried out has affected their day to day attitudes towards their work. Two of the workers stated that before they considered seriously early retirement but now they are more eager to continue working. In Palmia, among other development plans the project has risen, there are a visions of creating a permanent forums for similar experience sharing in form of an education center or a club for ageing workers. These visions will hopefully be realized in the near future.

Palmia organization, the ageing workers and the Finnish partners have seen the benefit of the project in the fresh way of raising awareness of various issues that affect individual well-being at work and in the developing of improvement visions with emphasis in the subjective perspective. The project findings have already influenced some organizational changes in Palmia's cleaning department. They were implemented to facilitate the work of the team leaders and the interaction between workers. Also, some individual workers have found places more suitable for their condition. This kind of customizing of workplaces will continue. In the future, Palmia will allocate a big sum of money to assure the well being of the ageing workers to enable their further education and care taking of the physical health. Furthermore educational and training practices will be developed according to what has been collaboratively developed in the project. One of the challenges in the organization is to prioritize ideas and development directions and create a goal, strategy and action plan to achieve it.

To summarize, the *main outputs and results contributing to the effectiveness of the Active@Work project*⁵ are as follows:

German sub-project	Italian sub-project	Finnish sub-project	All countries
Identified problems and obstacles that enterprises face in the adoption and implementation alternative working	Seniority Social Certification protocol	Concepts for practices: training practices, ways to identify, document and share experiences, good practices and tacit knowledge in form of	The process model for development, implementation and evaluation of measures for

⁵ The outputs and results are described in more detail in the reporting text of phases 1-4.

arrangements		narratives, video clips and visualisations; the process of user centred concept design	active ageing at work (including support tools gained from the sub-projects)
Practical solutions to these problems in a format of concepts and measures for innovative forms of employment actively supporting ageing in employment	Analysis of the local industrial scenario in the Province of Lecco	Concepts for spaces: redesign of a school attendants' workstation, awareness rising of issues that impede performance in the working premises	Dialogue forums in national and transnational level, workshops
Development of alternative working arrangements at enterprise level	Review of best practices and policies concerning innovative strategies of active ageing management at national level	Concepts for physical tools: improved cleaning trolley, novel idea for a toilet seat brush and easy to clean toilet for cleaning workers	Awareness raising and dissemination: seminars, lectures, web-site, leaflet
Piloting of alternative working arrangements at enterprise level	Book about the Italian sub-project	Concepts mobile technologies: 5 concept solutions, which are customized based on the personas' individual needs and presented as form of visual scenarios and illustrations, scenarios in form of cartoons describing the user action a	

All sub-projects applied common quantitative indicators that included number of direct beneficiaries (persons/companies/other) and their distribution by gender and age group (persons), size and economic/industrial sector (companies) and type of organisation (other).

Number of women	Number of men	Total number (so far)	Age group < 30 years	Age group 31-45 years	Age group 46-55 years	Age group >55 years	Total number (so far)
7	6	13				13	12
54%	46%	100%	0	0	0	100%	100%

Companies

Name	Number of employees	Size (micro, SME, large)	Economic/industrial sector
Palmia	2000	large	Maintenance
Deutsche Bank	70000	large	Banking, financial services
Continentale	2498	large	Insurance
SAP	12332	large	Software development
	86830		

Other organizations:

Name	Type of organisation	Number of associates	Sector
Unione Industriali	Association of Industrial entrepreneurs	500 enterprises	Trade Market
Assedili	Association of Builders	928 enterprises	Construction
API	Association of small and middle size enterprises	570 enterprises	Trade Market
CGIL	Labor Union	42.000 employees	Labour Market
CISL	Labor Union	45.000 employees	Labour Market
UIL	Labor Union	n.a.	Labour Market
UPAL	Provincial Craftsman's Union	9.386 enterprises	Local Handicraft
ASCOM	Traders Union	4.000 traders	Trade Market

3.2.2 On-going effectiveness evaluation in transnational level

The objective was to assess generalisation and transfer potential of the sub-projects' outputs and results in transnational level. Data collection consisted of three enquiry rounds taking place in the beginning of year 2005, a year later and the at the end of the project life. The questionnaires were addressed to sub-project leaders, but they discussed and changed opinions with end-user organisations as they answered the questionnaires. The questions concerned development processes of the main outputs of the sub-projects, transfer and generalisation potential of the outputs and project partnership. These topics were also discussed in the closed and open TDF sessions.

During the whole project all sub-project leaders shared the opinion that the approach of the development of main outputs was working "well". Several innovative features were identified:

- Focus on office jobs and knowledge workers - so far existing approaches in Germany have mainly addressed elderly workers in the manufacturing and production industry only.
- The comprehensive approach taken in Germany: series of areas of action instead of targeting to a small isolated area or group of workers or a specific department in an organisation.
- Attempt to develop a multitude of different measures and concepts in a generic format which bears the chances of re-use in and transferability to other organisations.
- Partially implemented selected measures in large organisations such as SAP, Deutsche Bank and Continentale constitute examples for other organisations in Europe, interesting learning practices with the potential of transferability.
- In the context of the Italian sub-project the innovativeness is grounded on involving of the end users and social partners together in various kind of activities (meetings, interviews, focus groups) in order to better define the potential utility of the SSC model.
- The innovative feature of the approach implemented in Finnish sub-project is using the user centred concept design approach in the field of organisational and individual change; co-design, creative forums with

employees and management, utilizing the idea of mass customisation in developing flexibility, visualisations and narrative aspects

Sub-project leaders were also asked to tell their opinions about the transfer potential of the other sub-projects' methods, (planned) outputs and results. The opinions were generally very encouraging, some methods and solutions of all sub-projects were seen as applicable in other working environments and other countries.

In the discussions of the TDF meeting in Italy the packing of the outputs and results was seen as a means to boost the transfer and generalisation potential. The participants of the final TDF meeting (Finland, September 2006) assessed the transfer and generalisation potential as follows:

Seniority Social Certification (SSC)

Good/innovative features:

- Tool for cultural approach in Italy, the model disseminates ideas not existing commonly in Lecco area yet.
- Dual purpose: can be used both as a formal certification given by local authorities/social partners and self-evaluation tool of individual companies.
- Territorial benchmarking.

Features contributing usability:

- Self-evaluation and self-benchmarking are a "soft" approach for SMEs: they can study their current situation and find problem areas themselves, they don't need to let outsiders tell them the development needs.
- The model suggests development ideas to companies after they have filled in the self-evaluation questionnaire ⇒ list of possible activities and policies for companies.
- Certification provides the companies with clear benefits, for example a) goodwill value, marketing value and b) certification may be a precondition to receive regional subsidies and subventions for a company, economical incentives to companies with the "SSC stamp".
- Social partners in Lecco area have participated actively in the development work of the SSC model: "selling" the model and its benefits and using it as a consulting tool is in their interest.

Features complicating usability:

- Companies are not usually very keen on filling questionnaires ⇒ the questionnaire forms should be easy to fill in and the whole model and its results should be easy to understand.

Use in other contexts:

- Couple of questions in the questionnaire are specific for Lecco region, most of the questions are generally applicable.
- Marketing strategy/marketing tool is needed to disseminate the use of the SSC to other contexts.

Alternative working arrangements developed for SAP, Deutsche Bank and Continentale

Good/innovative features, features contributing usability:

- Process: efficient, important elements: “process owner” in personnel department, “champion” in operational unit, “buy-in”
- Toolbox for personnel department, competitive advantage
- Exchange of experience supported by a facilitator/moderator.

Critical issues/features complicating usability:

- Worker participation at a later stage: should this be changed/improved?
⇒ May be critical. Needs to be embedded in organisation and organisational culture.

Questions/Use in other contexts:

- Model for different labour markets? Typical for Germany but also for other countries?
- Large companies: top-management as “client” vs. SMEs: stakeholder network, (cf. Italian sub-project)
- Need for a “supportive framework” to make things happen: passive ‘good-practice’ case banks usually fail.
- Need: The SSC and the process model as appetizer followed by facilitation mechanism.
- The industry dictates how development measures and changes are done, not the environment.

Alternative working arrangements for Palmia

Good/innovative features:

- Persona descriptions
- Verbalizing and visualizing tacit knowledge
- Translating (individual) needs into development possibilities by utilizing co-design tools.

Critical issues/Features complicating usability:

- Utilising the innovative features mentioned above requires special skills and knowledge
- Cultural change is needed towards senior workers.
- Visionary outcomes ⇒ are they realized?
- Mentoring –even over organisational borders- should be implemented and established in organisational practice.

Features contributing usability/Use in other contexts:

- Base for innovative processes ⇒ experience based working and decision-making ⇒ can be applicable in other design solutions, for example flexible production line.
- Co-design is resource intensive and calls for special expertise. How could such methods be used in other contexts? ⇒ Mass customisation as a solution.

The process model for development, implementation and evaluation of measures for active ageing at work

Good/innovative features:

- The process model has huge potential to be innovative, as it combines the results of three different approaches

Features contributing usability/Use in other contexts:

- Generally applicable due to its abstractness.

- Who are the users? Employers, employees, consultants, researchers, trade union representatives.

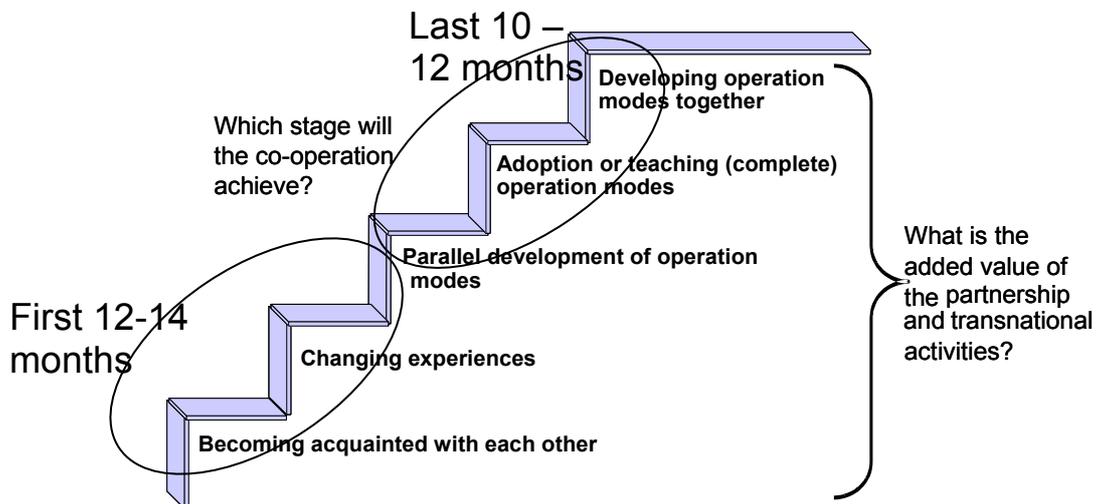
Critical issues/Features complicating usability:

- What happens when you have the results from the questionnaires?
- Which other company-specific tools are needed to realise the development process?
- Potential misuse of the model: using questionnaires to get rid of some employees.
- Process model will be implemented as a web-tool ⇒ web problems, web experience problems.

The added value of the partnership was also covered in the questionnaire and closed TDF discussions. The in the middle of the project life the conclusion was that project partners should find ways to establish communication between the sub-projects. Mainly the phases 6 Evaluation and 7 management were communicated in transnational level, the more interesting information concerning development work in sub-projects remained in national work groups.

From the value of the partnership point of view, the development of process model development was the most useful part of the project. The joint work on the process model clarified most questions and open issues concerning objectives and approaches of other sub-projects. The picture below describes the climbing up the partnership stairs:

THE STAGES OF THE ACTIVE@WORK PARTNERSHIP



Yet, co-operation in day-to-day work in each country could have been more active. There could have been more sharing of insights, findings, common goals and tasks. Lessons learned from the Active@Work partnership are: 1) Active@Work was an umbrella project of three different approaches which

complicated the collaboration. Parallel development is difficult, too. More attention should be paid to defining common topic, common project design and co-ordination and 2) the work which the process model helped significantly to understand other sub-projects and goals of other partners. There should be more common tasks and they should be started in the early stage of the project.

Authorised to sign on behalf of University of Tampere

Ms. Krista Varantola
Rector
University of Tampere

Done at (place)
..... (date)