



# **ENGAGED**

## **Evidence on impact Roadmap**



## **Executive Summary:**

The roadmap aims to develop and implement of a European monitoring framework for impact assessment of independent living solutions in testing grounds/ reference sites for wide scale deployment across Europe. A European monitoring framework for impact assessment could help to implement and scale up innovative solutions in a region or country. If this is developed and used in a joined collaboration with regions across Europe it is possible to reach scale on the evidence, to compare the outcomes of similar solutions/ interventions and to communicate about the evidence on a bigger scale. It could help exchange the impact of certain solutions in one region with other regions.



## 1 Introduction

The ENGAGED project organized a mutual learning workshop on the topic of Evidence on Impact of independent living solutions. This event was a joint action of the CASA project<sup>1</sup>, the thematic network ENGAGED and the action group C2 Deployment of innovative independent living solutions. To scale up independent living solutions in testing grounds and reference sites we need to collect and share more evidence on impact across Europe. However, in the area of independent living solutions the testing grounds for wide scale implementation lack a joint European framework of methodologies. Experts of regions across Europe of the CASA project and of the thematic network of ENAGED attended to these two-day working event. They shared their experience and knowledge on research methodologies and indicators for collecting evidence on the impact. Also from the action groups, the monitor group and Reference Sites of the European Partnership of Active&Healthy Ageing experts joined this event. During the event not only knowledge was shared, but also we worked together on the development of a joint methodology framework for monitoring the impact. One of the CASA partners, Scotland, sent experts from their region to share knowledge with the innovation clusters of the Reference site of Noord-Brabant. The innovation clusters in Noord-Brabant are running four testing grounds for large scale deployment of independent living solutions. The experts have helped them to develop a framework for collecting data for evidence on impact. The testing grounds of the Reference site of Noord-Brabant would like to use this framework, and share - of course - the results across Europe.

The objectives of the event were:

1. To share knowledge and experiences on tools for impact assessment of AHA solutions
2. To develop a joined European methodology framework for monitoring the impact of independent living solutions to create a better overview of existing innovations ready for market uptake and the scientific and experiences based evidence of these innovations in practice.
3. To help the Brabant testing grounds for wide scale deployment of independent living solutions to develop a framework for impact assessment.

Outcomes of the mutual learning workshop

- A draft concept of a Framework for impact assessment to be used in the testing grounds of the region of Noord-Brabant
- A common sense and vision about:
  - The minimum set of assessment criteria we need to know about to choose and to buy or procure independent living innovations and to reach upscaling across Europe
  - The approach for assessing existing evidence that is needed for wide scale deployment of independent living solutions.

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<sup>1</sup> <http://www.casa-europe.eu/>



The scale of measurement and the organization of the process needed for impact assessment in regions and the exchange between regions.

## **2 Roadmap Stream overview**

The roadmap aims to develop and implement of a European monitoring framework for impact assessment of independent living solutions in testing grounds/ reference sites for wide scale deployment across Europe. A European monitoring framework for impact assessment could help to implement and scale up innovative solutions in a region or country. If this is developed and used in a joined collaboration with regions across Europe it is possible to reach scale on the evidence, to compare the outcomes of similar solutions/ interventions and to communicate about the evidence on a bigger scale. It could help exchange the impact of certain solutions in one region with other regions. The EIP AHA has developed a Monitoring Framework for impact assessment of the Reference Sites and Action groups. Based on the developed theoretical framework for the EIP AHA a Questionnaire has been developed for the Reference sites and Action groups. The goal was to assess the impact of the EIP AHA collaboration on a European level. For the regional level of wide scale deployment by the means of testing grounds and reference sites a concrete and more practical framework is still needed. For the mutual learning workshop experts of three different reference sites exchanged existing impact assessment tools: Scotland, Catalonia and Noord-Brabant. With experts of the EIP AHA C2 action group was also an exchange about their actions and the gaps they identified. Also with the European Commission knowledge was exchanged about the monitoring framework of the EIP AHA. Based on the exchanges a matrix was developed to start working jointly on a monitoring framework for impact assessment for independent living solutions in regions and for exchange and comparison between regions.

## **3 Roadmap Stream status and perspectives overview**

### **3.1 Actual status**

#### **Lack of evidence culture**

One of the barriers for wide scale deployment of innovative solutions is a lack of evidence on the impact of these solutions in different regions. This makes it difficult for investors and reimburses or buyers and policy makers to judge about the impact of the solution in daily live. They lack a good basis for decision making about economic and social impact such as cost effectiveness and the impact on the quality of life.

Also comparison between regions in and across Member States using similar innovations related to certain interventions is not possible. There is also no exchange between regions about the outcomes of impact assessments. There is a lack of evidence culture for this. Therefore we lack evidence on the impact of innovations on a big scale.

#### **Lack of monitoring framework for independent living solutions**

In the field of independent living solutions, we lack a good monitoring framework to assess the impact of innovations in different testing grounds and reference sites for wide scale



deployment. For medical solutions already a MAST framework exists, but for the broader field of independent living there is no common understanding yet in different regions across Europe.

### 3.2 Desired status

A European overview and insight in a minimum set of criteria for experience based evidence and evidence based practice to help consumers in their decision making process to make better use of independent living solutions in their daily live and to help entrepreneurs to scale up these solutions.

### 3.3 Gap analysis

In the mutual learning workshop a first matrix was discussed and developed with different criteria to explore the different areas and perspectives for impact assessment of concrete innovative solutions to scale up in testing grounds/ in practice. The focus point was to develop a framework for the three Noord-Brabant testing grounds on Self Care, Informal Care and Dementia that can be used by other testing grounds across Europe.

A first minimum set of criteria was formulated to reach wide scale deployment:

- The price of a product/ service (affordability)
- Were to buy or get access to a product or service?
- Effectiveness and reliable use
- Cost effectiveness
- Quality of life
- How many users are using the product/ service?
- How do they judge the product/service?

*The main gaps identified were:*

- A lack of collection and insight in user experiences in testing grounds or reference sites for wide scale deployment on how they experience innovative independent living solutions in daily live. With users is meant the citizens, patients and informal carers and professional care givers.
- A lack of a theoretical European framework for impact assessment of independent living solutions. Which impact criteria do we need to assess to cover the impact on independent living which we need to know to reach wide scale deployment?
- A lack of a good balance between user experiences (practice based evidence) and evidence based practice (quantitative intervention research). A lot of emphasis is put on randomized trials and evidence based practice. Because of different contexts in Europe (different health and social care systems, financial systems, cultural



differences, different interventions etc.) in which innovations are implemented it is difficult to compare results on an individual intervention level in a quantitative way.

## 4 Suggested Roadmap

### 4.1 Roadmap overview

*The main directions for development of the monitoring framework*

1. Development of a tool: **a consumer platform** with methodologies to collect users' experiences (primary and secondary users) to assess from user perspective the impact of independent living solutions across Europe.
2. Develop or select a minimum set of quantitative and qualitative outcome criteria to assess the impact of independent living solutions across Europe, **adjustable to specific target groups and different regional contexts across Europe**.
3. Explore how the quantitative and qualitative approaches can be linked to the European monitoring framework of the EIP AHA to be used by different regions.

### 4.2 Milestones, time frame and related recommended actions

The process of the Evidence on Impact Roadmap development is divided in three stages. In the table below an overview is given of the milestones, the time frame and different stakeholders that have been participating in the development of the roadmap.

Stages of roadmap development	Milestones	Time frame	Multi Stakeholder Group
<b>Stage 1:</b> Roadmap for the development of an actual regional consumer platform for the testing grounds in Noord-Brabant to learn how this kind of consumer tool can be used to improve the collection of <b>practice based evidence</b> from primary and secondary users of independent living solutions in a region.	1,2,3,4,5,6	2014	<ul style="list-style-type: none"> <li>• Reference Site EIP AHA of Noord-Brabant;</li> <li>• ENGAGED network</li> <li>• C2 + B3 Action Groups of EIP AHA;</li> <li>• Health Cluster Europe including the CASA Interreg project</li> </ul>
<b>Stage 2:</b> Development of a minimum set of assessment criteria of quantitative and qualitative data to be used by the testing grounds of Noord-Brabant as a learning exercise to improve the	7	2015	<ul style="list-style-type: none"> <li>• Reference Site of Noord-Brabant;</li> <li>• ENGAGED network</li> </ul>



<p>insight in regional <b>evidence based good practices of independent living solutions from an European up-scaling perspective</b> to build the European market</p>			<ul style="list-style-type: none"> <li>• Health Cluster Europe</li> <li>• INNOVATE DEMENTIA Interreg project</li> <li>• STOPandGO project</li> <li>• Working group including experts of all Action groups of the EIP AHA</li> <li>• ECHAlliance</li> </ul>
<p><b>Stage 3:</b> Development of an <b>interregional monitoring framework for impact assessment of good practices of innovative independent living solutions</b> across Europe, including a consumer platform tool and minimum set of quantitative and qualitative criteria and methodology to assess the level of evidence on impact of independent living solutions that are used across Europe.</p>	<p>8,9,10</p>	<p>2015/2016</p>	<ul style="list-style-type: none"> <li>• Reference Site of Noord-Brabant;</li> <li>• ENGAGED network</li> <li>• Health Cluster Europe</li> <li>• INNOVATE DEMENTIA Interreg project</li> <li>• STOPandGO CIP project</li> <li>• Working group including experts of all Action groups of the EIP AHA</li> <li>• ECHAlliance</li> <li>• AAL projects</li> <li>• EVPA</li> </ul>

#### 4.2.1 Milestones in 2014

In 2014 the development of the roadmap has started. The first six milestones for 2014 were mainly focused on the first direction that has been identified for the roadmap: improvement of the collection of user experiences by a user platform. A user centric design approach and up scaling perspective are the central focus and starting points for the development and implementation of a consumer platform. Therefore it is important that all stakeholders of the



whole value chain and potential users of the consumer platform are involved from the beginning of the process of the development of the roadmap.

### **M1- Coordination of the roadmap: exploration phase (Month 4-12/14)**

#### ***Coordination team***

Reference Site Noord-Brabant of the EIP AHA coordinates the exploration phase of the development of the roadmap for the first identified gap: the development of the consumer platform. The regional cooperative Slimmer Leven 2020 and the province of Noord-Brabant coordinate the development process. The Reference Site Noord-Brabant is a regional multi stakeholder network that is focused on the deployment and scaling up of innovative independent living solutions. This action was a follow up of the preparation work they did for the organization of a European mutual learning seminar on evidence on impact that took place in Eindhoven at 3 March 2014. The idea of the consumer platform was the outcome of this seminar.

#### ***Noord-Brabant Working Group and European Advisory network of experts***

A group of five experts with different backgrounds form a working group. They represent different stakeholders (users, education and research, businesses, government, health-&social care) of the Reference Site Noord-Brabant and are a member of the Cooperative Slimmer Leven 2020. They have developed the roadmap in co-creation with the members of the CSL2020 and the testing grounds of H@H in the region of Noord-Brabant and experts of a European advisory network.

Important first users of the platform to create mass are the Noord-Brabant testing grounds of Health@Home. Also other living labs and testing grounds in the Netherlands are the first users. In a second stage living labs of other regions in Europe could be future users of the consumer platform. To create commitment for this second stage, different experts across Europe of different stakeholder groups will already be involved from the start. The development of the Dutch consumer platform and the second stage is shared with a European Advisory network of experts during several meetings and events of: regional governments of CORAL<sup>2</sup>, the C2 and B3 Action groups of EIP AHA, the ENGAGED network, a working groups in which representatives of all the action groups of the EIP AHA are involved in the development of an assessment tool with criteria for the validation of good practices across Europe, the collaborative of Reference Sites of the EIP AHA and the Health cluster Europe of the Interreg project E-UCARE.

### **M2- Mapping and analysis of existing platforms (Month 4-7/2014)**

A quick scan has been carried out to get an overview across Europe and in the Netherlands of existing platforms. Also they have looked into other branches to existing instruments like Zoover and Amazon. A subcontractor has been selected to do this work and has been financed

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<sup>2</sup> <http://www.coral-europe.eu/>





by the province of Noord-Brabant. Based on the formulated starting points of the consumer platform- that were formulated in the mutual seminar - an analysis has been done about the usage of these platforms or relevant functions that are preferable to build in a new platform. A report has been delivered with the overview and results of the analysis and recommendations for the testing ground Noord-Brabant and use of the platform across Europe by other regions.

### **M3- Search for and mobilization of private party (Month 4-7/2014)**

At the start of the exploration phase in M1 several channels have been used to search for and to mobilise a private partner that is willing to build a consumer platform. Several bilateral meetings have been planned with the coordination team with several interested companies. Goal was to find as soon as possible a private partner who would like to grab this business opportunity and who is willing to invest in the development of the platform. Within 2 months 'time a company was found that would like to start the building of the consumer platform ASAP. The launching of the platform took place at the 23 October during the Health Forum in Eindhoven in the Netherlands.

### **M4- Dissemination of the concept (Month 7-12/2014)**

Several bilateral communication activities have been carried out during the exploration phase. As soon as a private partner was found, dissemination activities of the ENGAGED project have been fine-tuned with the development plan of the company. Dissemination activities took place by using the communication channels and events of the multi stakeholder network Health@Home community of Noord-Brabant, the EIP AHA, the ENGAGED thematic network and the CASA project:

- 2 July 2014 a Brabant Health@Home meeting was organised. During a workshop the concept has been presented to and shared with the participants.
- CASA final conference 7 October 2014: the concept was presented to other regions and the European Commission.
- The World Health forum at 23 October 2014 was the event where the consumer platform has been launched. During this event several regional innovation clusters and regional governments in Europe were personal invited by the Reference Site of Noord-Brabant to explore the opportunities for testing the consumer platform in their own region. They were asked if they were willing to invest to test the same the same concept in their region, later in 2015. Based on that 1 region has reacted (the region of Zeeland) to come back on this opportunity in 2015.

### **M5- Recommendations for support for the next phase (Month 7-12/2014)**

Pre-testing of the platform started in the testing ground of Noord-Brabant in 2014. The private partner developed a private business model. They also explored the financial and investment possibilities to cover the costs for the development and testing phase. Which investors would be interested and willing to invest in the development of the platform? The working group has offered support to the private partner in bringing relevant partners together in the region. Also the working group has helped the private company in making connections with other regions within Europe. Based on these connections the company has explored the opportunities for



the development and testing of the consumer platform in other regions across Europe in 2015. Which region would be willing to invest in it? Which regions would be willing to collaborate on this together?

#### **M6- Financial plan (Month 4-12/2014)**

The total amount of hours in the exploration phase that has been carried out by the experts of the province of Noord-Brabant and by the experts of SL2020 has been financed by the regional Smart Health Programme. For the follow up actions in 2015 a new proposal has been made and presented to the regional program of Noord-Brabant and CORAL. The province of Noord-Brabant is willing to invest in the follow up actions and made a budget reservation for 2015 that enables to continue the work in collaboration with other CORAL regions and experts of the EIP AHA.

#### **4.2.2 Milestones in 2015/2016**

In 2015 the development of an interregional monitoring framework for independent living has started in collaboration with the EIP AHA. During the reviewing of the draft roadmap it was agreed that there are different evidence on impact methodologies and frameworks that are used at the moment. These methodologies have been developed in European projects such as the MOMENTUM assessment framework, the MAST framework, etc. We do not have to develop new assessment tools to measure the evidence on impact of independent living solutions in regions. But, we miss an overview in Europe of available evidence on impact of independent living solutions. A European framework is needed to exchange different type of evidence results of different sources between different regions across Europe.

This framework helps to identify trends in terms of impact of solutions in different parts of Europe. It allows different assessment frameworks to be used in different regions. It helps to identify trends based on the outcomes of the different assessment frameworks that are used.

#### **M7- Development of a minimum data set for independent living (Month 1-8/2015)**

A desk research of micro- and macro studies will be conducted to select a minimum set of social and economic impact indicators for independent living. This evidence needs to be build on generic indicators related to a mix of categories that cover the scope of independent living. The focus will be on generic impact indicators that are appropriate for different contexts and target group area's in the field of independent living in Europe. This is necessary for scaling up the evidence of independent living solutions.

Also often used validated quantitative and qualitative instruments and mixed-methods research design across Europe will be identified from the existing repository of EIP AHA and the work of the action groups of EIP AHA.

Together with the EIP AHA and representatives of the different action groups a methodology will be developed for the assessment of the level of available evidence on impact of independent living solutions across Europe and how to collect this in the repository of the EIP AHA.



#### **M8: Testing and peer reviewing of the framework (Month 6/2015-4/2016)**

The framework will be tested in the area of Dementia. This will be done from the perspective of building the European market.

The framework will be tested and peer reviewed in the European STOP and GO Project<sup>3</sup> in the pilot region of Brabant. This enables also to include not only the evidence based practice sources, but also the practice based evidence source by the means of the consumer platform. The STOP & GO project is focused on the development of innovative procurement. In Brabant the innovative procurement process will be focused on independent living of people with Dementia. A multi-stakeholder group of businesses with innovative solutions for people with dementia at home, local government, research centres and end user organisations will improve the procurement process. A shared risk investment approach is leading. The impact of solutions is the basis to decide in the end if a solution will be financed by procurement.

Another action is to organize a peer review with missing stakeholders that are also important for building the market and who look from a market and business perspective such as impact investors. They are interested in social and economic impact of solutions. They are interested in the fact if an innovation of a business is impact ready and therefore ready for investment for a broad uptake in the market. Together with different European networks such as CORAL, ECHAlliance a European Do-concept for peer reviewing will be developed for investors and investees and living labs. The concept will help to:

- Do: to collect innovative solutions across Europe for different target groups such as innovations for people with Dementia and to share, store, and validate data at an investment, fund and/or portfolio level
- Assess: investors analyse the quality, level and efficacy of the work generated.
- Review: shared insights on the framework and feedback from all parties.

#### **M9: Testing of the consumer platform in two different countries (Month 6/2015-12/2016)**

The consumer platform offers a new qualitative tool and practice based evidence source to regions to collect user experiences based on the use of innovations in daily practice.

The concept of the consumer platform needs to be tested in at least two other regions in Europe. The goal of this test is to learn more about how the consumer platform can be used in other regions across Europe.

Within CORAL and regions of the AER and ECHAlliance regions will be informed about the concept of the consumer platform and the regions will be invited to test the consumer platform. Bilateral contacts with interested regions will be planned in Brabant in 2015 to explain the concept more in depth. The Dutch company of the consumer platform will explore the regional context of the interested regions. They will plan a two-day visit to the region to talk with different stakeholders of the value chain in the other country to get an insight in the possibilities for exploitation of the concept to this other regional/national context.

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<sup>3</sup> <http://stopandgoproject.eu/>



For the development phase a new financial plan will be made in co-creation with the interested regions.

The use of the consumer platform will be tested in two regions and evaluated.

A peer review in each region will be organised by a multi stakeholder group and experts of different regions across Europe. Two case studies will be derived in which the lessons learned and recommendations will be described for how to link this practice based evidence on impact source to the European holistic framework.

### **M10-Disseminate results to raise awareness for a holistic approach**

The challenge is to get a common understanding about the importance of a **holistic framework** that contains an interrelated medical & ethical impact framework and a social & economic impact framework. Integration of these different types of data collection from different sources is still a challenge and not a common approach across Europe. Although some existing frameworks such as MAST are offering a holistic approach, decision makers are still focused on a limited amount of type of data collection and interested in the outcomes of limited sources. Also decision makers of the medical field are often only focused on specific medical indicators instead of more generic indicators related to the quality of life. The practice based evidence sources also are used very limited. The consumer platform is a good practice to show the importance and the possibilities of this tool to build in this source for decision makers. Dissemination of the vision and sharing of experiences from practice will be done by existing channels of bigger network events by organizing workshops and sessions at the AAL Forum, during the eHealth week and in European project events. Also dissemination to regional levels will take place by existing channels of CORAL, ECHAlliance and the AER. The repository of the EIP AHA is also an important channel to disseminate the vision and to offer tools and guidance how to bring this into practice.

#### **4.2.3 Recommended actions**

##### **Summary of Actions 2014**

- Development of a regional consumer impact assessment platform for independent living solutions tested in the testing grounds in Noord-Brabant;
- Share the first ideas, methodologies used with other CORAL regions and reference sites;
- Develop a minimum set of quantitative and qualitative generic criteria related to different type of data collection for independent living to be used in the regional monitoring framework, based on the outcomes of the work and results and experiences of the monitoring framework of the EIP AHA.
- Explore, decide on and define the approach for the regional (and inter-regional) monitoring framework for testing grounds/reference sites including quantitative and qualitative evidence based criteria and qualitative more user experiences based criteria of different sources from science and practice.

##### **Summary of Actions in 2015-2016**



Development of a European consumer impact assessment platform and holistic monitoring framework with minimum data set to measure the impact of independent living solutions in different regions in Europe: test the methodologies and tools in two other regions/reference sites:

- Disseminate the vision, tools and methodologies used for the consumer platform and the minimum set of other criteria's within a holistic European monitoring framework to collect and identify trends in the existing evidence on impact with other CORAL regions, the regional ecosystems connected to the ECHAlliance and the AER;
- Test and peer review the holistic framework in the STOPandGO project during an innovative procurement process focused on innovative solutions to support the independent living of people with Dementia.
- Test and peer review the holistic monitoring framework for evidence on impact for different target groups such as people with Dementia from a market and business perspective by a multi stakeholder approach with also impact investors.
- Stimulate and mobilize 2 other regions to translate the consumer platform tool to their regional context and test it out in their own region.
- Disseminate and share the results and vision within the EIP AHA and events of ENGAGED partners and European events of AAL Forum, the eHealth week and European projects events.

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