# ASPIRE – Evaluation plan

This is a draft plan for the evaluation of the ASPIRE project, prepared by the evaluator, Professor Stephen McNair.

## Aim

The aim of the ASPIRE project is to understand processes through which social partners develop, pilot and implement active ageing interventions (including collective agreements) and reorient away from a collusion toward early retirement[[1]](#footnote-1).

The project intends to work with employers and trades unions in manufacturing and the public sector in the four countries.

## Research Questions

The project proposal defines the research questions as:

1. How do different industrial relations (IR) structures facilitate and/or inhibit the dissemination and implementation of collective agreements on active ageing?
2. How are age and employment perceived in workplace contexts within different IR systems?
3. How do employers and trade unions respond to EU and national social activation policies in creating sustainable work opportunities for older workers?
4. How are the interests of older and younger workers negotiated and reconciled through workplace level mechanisms?
5. How are good practice and innovations in the dissemination of active ageing approaches shared between and within different national contexts and in Europe?

## Deliverables

The project will produce three deliverables:

1. A one day training module for HR professionals
2. A web based resource for sharing good practice
3. A social network for practitioners

## Evaluation priorities

The evaluation will be both formative and summative. By monitoring activity throughout the project it will seek to inform the work as it progresses, and this will contribute evidence to the final report. The evaluation will examine the project’s academic rigour, outputs, transnational comparability of the data and impact of the outcomes on real-life negotiations and joint working of social partners on ageing workforces.

The necessary core questions concern contract compliance, exploring the following questions

1. Did the project overall do what was agreed?
2. Did the individual partners do what was agreed?
3. Were the deliverables produced?
4. How far were the objectives achieved?
5. What was not achieved and why?
6. Was the budget appropriately spent on the agreed activities?

However, the partners have a range of wider aspirations in terms of change in the behaviour of social partners, and in the lives of older people. The evaluation will also seek to understand some of the following questions:

1. Aspirations
   1. What change and learning, by social partners and older people, did the partners hope for?
   2. How far were these achieved?
   3. What lessons have been learned for future project work?
2. What unintended outcomes were produced – both good and bad?
3. What was learned about the ability of the social partners to innovate?
4. What has been the impact of the project, and how sustainable is it?
   1. What change did partners seek and what did they achieve?
   2. Will people use the findings? Who and how?
   3. Will any change created be sustained – for how long?
5. What has been the impact of the project on the four project partners
6. What evidence do we have that change has taken place in the quality of life of older people

## Contextual variables

The project is working in four very different countries/regions. The answers to research questions, and strategies for effective intervention will necessarily be affected by a range of contextual factors. The desk research will map some of these, to help in estimating the transferability of strategies and interventions. Some of the variables include:

1. The diverse expertise and interests of the four core partners
2. Demography
3. Welfare state models
4. Models of capitalism
5. Industrial relations history
6. Labour market issues – labour demand now and in the future, unemployment, age
7. Constraints on change – legal, practical, pensions, public attitudes
8. Role and scale of players - trades unions, employers, collective bargaining
9. Nature and role of lobbying organisations
10. Nature and role of relevant research organisations

## Evaluator’s interventions

The evaluator will:

1. Prepare and agree the evaluation specification (the current document)
2. Survey team members every three months

Examining progress, targets and milestones, using a framework of questions to be agreed with the partners (see below).

1. Survey the views of the social partners

A common instrument will be designed. Each national partner will translate this and administer it to the relevant social partners in their country. They will translate the findings and submit them to the evaluator for analysis.

1. Survey workshop and roadshow participants

A common survey instrument will be designed. Each national partner will translate this into the relevant language, administer it and submit translated copies of responses to the evaluator.

1. Produce interim report

This will be in a publishable form, and will report on what has been achieved, what remains, what (if anything) might usefully be changed

1. Produce the final report.

This will be a published document. It will describe the project, and answer the evaluation questions listed above.

1. Contribute to dissemination - during project and afterwards
2. Report on the extent to which the budget was spent on the proper purposes of the project, and explain any discrepancies

To do this, the evaluator will:

1. Attend meetings of the four partners
2. Monitor activity in the online communities – Moodle, LinkedIn, Twitter etc.
3. Prepare the team surveys (in consultation with the partners), and analyse the responses
4. Prepare the survey instrument for the workshop and roadshow participants, receive and analyse the results
5. Contribute to discussions on the revision of materials.
6. Consult the four partners on drafts of the two public reports, and produce final versions.
7. Take part in dissemination activity as agreed with the project team.
8. Receive balance sheets showing budgets planned and spent, and timesheets for project participants.

## Reporting schedule

The evaluator will request brief standard data from the partners very three months. This will ask:

1. Is the work proceeding according to plan?
2. Have any relevant deliverables been produced?
3. How far were the objectives for the period achieved?
4. What was not achieved and why?
5. Was the budget appropriately spent on the agreed activities?

Specific information will be requested on particular issues at each stage as follows:

|  |  |
| --- | --- |
| **Report Date** | **Activity** |
|  | Aspirations for broader outcomes from the project |
| 1 April | Establishment and use of online tools and website |
| 1 July | Completion of desk research |
| 1 October | Completion of qualitative interviews |
| 1 January | Progress of workshops |
|  | *Interim Report* |
| 1 April | Completion of workshops and preparation of data analysis |
| 1 July | Completion of data analysis and preparation of training materials |
| 1 October | Completion and testing of training materials. Dissemination activity |
|  | Final meeting in Brussels |
| 31 December | Revision of training materials and dissemination activity |
| 31 January | *Final Report* |

Evaluator survey points marked in grey

1. Active ageing means helping people stay in charge of their own lives for as long as possible as they age and, where possible, to contribute to the economy and society. *DG Employment, Social Affairs and Inclusion* [↑](#footnote-ref-1)