

GLOBAL EVALUATION METHODOLOGY: 1st EEC feedback report

Project Name: **“MOAI LABS: Collective Intelligence and Health Technology Laboratories to fight against the social isolation and loneliness of the elderly”**

Acronym: **MOAI LABS**

Programme: **INTERREG V B SUDOE**

Code: **SOE4/P1/E1078**

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1. INTRODUCTION

The Global Evaluation Methodology of the **MOAI LABS** Project provided information about the methods that will be used to track the progress of MOAI's activities, and to ensure its continuous improvement. It has been decided that the project's evaluation will be performed by an External Experts Committee (EEC), who has been identified by all the partners. This Committee is comprised by 9 external experts (2 from Portugal, 1 from France and 6 from Spain), who combine expertise in gerontology, community intervention, technology, and projects' evaluation.

To perform their tasks/roles, the EEC will have to produce regular feedback reports, and to attend to videoconferences throughout the project.

Evaluation matters, as stated by the European Commission. In an increasingly complex and challenging environment for international development, the importance of demonstrating our results and learning from experience has gained significant value. The MOAI's working group is committed to the "evaluation first" principle, using evaluation as a critical tool to inform its choices and decisions on the best available evidence to improve practices. With the global evaluation methodology that has been defined, it is our intention to generate knowledge about what works, and what does not, under what conditions; facilitate evidence-based decision-making; and improve development policy and practice by sharing experience. The evaluation will follow the principles of *transparency* (data will be available to the public, in consideration of ethical issues), *independence* (since it will be performed by external experts), *ethics* (the rights and dignity of all the programme participants, beneficiaries and stakeholders will be guaranteed), *quality* (evaluations will provide robust and credible evidence-based conclusions) and *utility* (evaluations will provide critical information and recommendations to improve the progress of the activities to be accomplished).

UAVR designed an evaluation methodology for MOAI LABS project, considering the guidelines suggested by the Organisation for Economic Co-operation and Development (OECD) and European Commission (EU). This methodology was then discussed within the EEC through an online meeting held in the beginning of May 2021. With all the experts' inputs, a final evaluation form was created: the "feedback report".

1.1. THE FEEDBACK REPORT

The EEC will produce 3 feedback/progress reports. These reports are scheduled to be delivered at three distinct times: November 2021; May 2022; and November 2022.

The evaluation form uses the RAG (Red, Amber, Green) system. RAG is used when project managers are asked to indicate how well a project is doing using the series traffic lights. The report has 7 sections; external experts will have to fill it with information as regards to:

- **The execution of the operational objectives, activities, and deliverables**, for the period of evaluation, as defined in the workplan (section A). If the activity was completed on time or is delayed up to 15 days, a green traffic light will be displayed; if the activity is delayed between 16 to 30 days, the amber traffic light will be displayed; activities with more than 30 days of delay will be attributed the red traffic light. The expert will insert the “forecast/actual date” of the activity and the traffic light will automatically appear. Besides the red, amber, and green traffic light, the experts can also opt to use the “zebra crossing”, by responding “Yes” to the question “Caution call?” - which can be interpreted as a “stop and reflect” message for the partners. The “caution call” represents the need to consider contextual elements and/or contingencies that require the partners to pay closer attention to what is happening. Thus, the “zebra crossing” will be used if the experts find that a particular activity may have threats that can compromise its accomplishment, requiring the need to “slow down” and to reflect about strategies to address it (details will be provided in the “comments” section).
- **Other measures**, namely: the fulfilment of the work plan (potential deviations and their impact), the correlation between the progress of the project considering what has been defined in the application form (e.g., objectives, deliverables and results), and overall results (section B);
- **Difficulties encountered**, its impact on the project (high, medium or low) and management actions (section C);
- **Recommendations on the evaluation period** (section D);
- **Recommendations for future work** (section E);
- **A global appreciation**, with some questions to guide it, considering relevant criteria indicators, such as: effectiveness, efficiency, relevance, coherence, impact, and added value (section F); in this section, the RAG system was defined as follows: 0-9 will display a red traffic light (e.g., delays against critical milestones more than 2 months; problems

- with quality that lead to significantly more work at additional cost; dissatisfaction or resistance from partners, participants and/or stakeholders and benefits not achieved); 10-15 will display an amber light (e.g., problems with quality but not causing a delay; lack of resources which can be resolved by the partner/s); and 16 or more will display a green traffic light (e.g., project on plan; quality at expected levels; no resource problems; partners, participants and stakeholders satisfied with the activities' progress); and
- **Contacts** made to collect data, for example, with the partners, the co-creation sessions' participants, and/or stakeholders (section G).

2. FIRST FEEDBACK REPORT: MAIN RESULTS

External experts (n=9) worked individually in this first feedback report, which considered the activities developed in the period comprised between November 2020 (MOAI LABS project start date) and September 2021. Each expert filled the feedback report until the 30th of November 2021 (4 experts asked for an extended deadline, for agenda constraints; UAVR extended the deadline for two more weeks); all the experts signed the report and sent it to UAVR, who then compiled all the information and produced a consolidated version of the received reports. The final version was then sent to the EEC for validation. After validation, parts of the report will be published on the projects' website, as a measure of transparency (in consideration of ethical issues). The information compiled, containing the main results of the topics under evaluation, are described below.

A) EXECUTION OF OPERATIONAL OBJECTIVES, ACTIVITIES AND DELIVERABLES

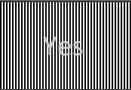
Most of the activities expected to be performed during this period have been concluded, as it may be seen in table 1. The experts reported green traffic lights for most of the activities, deliverables, and operational objectives, apart from:

- **GT1: deliverables E.1.2.2. (scientific review) and E.1.5.1. (definition of each challenge and ambition at a transnational level);**
- **GT2: deliverable E.2.1.1. (MOAI Challenges needs identification map);**
- **GTT1: deliverable AT1.5. (designation of the First Level Controller).**

Table 1

Status of the operational objectives, activities, and deliverables

(A) Operational objectives, activities and deliverables	Status	Traffic Light	Caution call? (Yes or No)	Comments provided by the EEC
GT1				
E.1.1.1. Composition and governance - Transnational laboratory MOAI LABS (i2ml)	Complete	●	No	
E.1.1.2. Community engagement and co-creation model (i2ml)	Complete	●	No	
E.1.1.3. Competences cartography and Specialization Plan (i2ml)	Complete	●	No	
E.1.2.2. Scientific review (GSS)	Delayed	●	Yes	<p>Planned date (target date) was 30/04/2021. Experts also add a caution call on this task, since they understand it could have compromised the development of the following activities.</p> <p>Furthermore, in EEC's perspective, the draft of the scientific review is very interesting and has innovative views (e.g., older adults are not so lonely, they are more engaged than younger people; the co-relation between loneliness and frailty), but they suggested a more structured review, with a more up-to-date references and the use of scientific databases, such as Web of Science (WoS), Scopus and Dialnet.</p>
E.1.3.1. Engagement Plan (i2ml)	On-going	●	No	
E.1.3.2. Data analysis of co-creation sessions (i2ml)	On-going	●	No	
E.1.5.1. Definition of each challenge and ambition at a transnational level (TicBioMed)	Delayed	●	Yes	<p>Experts also add a caution call on this task, since they understand that this delay may have affected the subsequent activities.</p> <p>However, 2 external experts stressed that some preparatory tasks had already begun to define the methodology to be used in the co-creation sessions (to define the MOAI challenges), which was valued. It was also valorized the progress that has been made regarding the Early Demand Group recruitment, as well as the definition of the methodology that would be used with this group.</p>

GT2				
E.2.1.1. MOAI Challenges needs identification map (LEITAT)	Delayed		No	When the 2 nd execution report was submitted, the MOAI Challenges were not defined.
GTT1				
AT1.4. Execution reports (each beneficiary)	Complete		No	
AT1.4. Execution reports (INTRAS)	On-going		No	
AT1.5. Designation of the First Level Controller (INTRAS)	Delayed			1 year delayed.
AT1.5. Periodic costs declarations (each beneficiary)	Complete		No	
AT1.5. Periodic costs declarations (INTRAS)	On-going		No	
GTT2				
ET2.5.1. Communication Plan and accounts in social networks (update) (FUNGE)	Complete		No	
ET2.6.1. Communication Report (update) (FUNGE)	Complete		No	
GTT3				
ET3.2.2. Evaluation Plan (new version) (UAVR)	Complete		No	
ET3.3.2. Risks and Contingencies Matrix (update) (INTRAS)	Complete		No	

B) OTHER MEASURES

B1. FULFILLMENT OF THE WORK PLAN

EEC understands that the delay on the first steps of the MOAI LABS project forced some changes on the work plan. In their perspective, the pandemic crises may have interfered on the activities planned, particularly the ones that have the “*most vulnerable persons*”, as older adults, as the focus of the intervention. Furthermore, they stressed that the deviations from the initial plan are acceptable and would not have a negative impact on the project. They also emphasized that the regular updates on the risks and contingences matrix regarding those issues suggests that efforts have been made to respond to these challenges and that it has been fulfilled as expected.

They considered that the risk matrix (ET3.3.2. Risks and Contingencies Matrix) is very complete, with an indication of the risks, an assessment of their probability and impact, and an approach to mitigation measures. It was emphasized, however, to continue to make an effort to prevent more delayed tasks.

In a scale from 0-20, the EEC rated the **fulfillment of the work plan** with a mean of **16.0 values** (ranging from 10 to 20), meaning that they considered that the MOAI LABS project is on plan and that there are no significant resources problems– green traffic light (table 2).

Table 2

Fulfillment of the work plan: values and RAG by EEC

EXTERNAL EXPERT	VALUE	RAG
E1	17	
E2/E3	18	
E4	15	
E5	10	
E6	16	
E7	20	
E8	16	
E9	16	

B2. CORRELATION BETWEEN THE PROGRESS OF THE PROJECT WITH WHAT IS DEFINED IN THE APPLICATION FORM

The EEC reported that, currently, there is a coherence between each role of the partners and the objectives:

“(...) the project is progressing, meeting the established deadlines very well and preparing the deliverable documents.”

It was stressed that the deliverables are consistent with the expectations. One expert emphasized that the integration in the project of the needs (experts by experience), the supply (early demand groups), the demand (potential buyers), and the environment (community), make MOAI LABS a unique project that add all the parts of the problem, from the diagnosis to the market solutions.

In a scale from 0-20, the EEC rated the **correlation between the progress of the project with what was defined the application project** with a mean of **17.13 values** (ranging from 15 to 20), meaning that there is a strong consistency between what has been defined in the application form and the activities performed so far – green traffic light (table 3).

Table 3

Correlation between the progress of the project and the application form: values and RAG by EEC

EXTERNAL EXPERT	VALUE	RAG
E1	17	
E2/E3	20	
E4	15	
E5	16	
E6	16	
E7	20	
E8	17	
E9	16	

B3. OVERALL RESULTS

The EEC significantly valued the presence of the MOAI LABS project in social networks and at scientific and professional events. One expert expressed that:

“There is an excellent coverage of all the events, especially on LinkedIn. The scientific publication committee was also a great way to get people involved.”

The EEC listed, for instance, the presentations at III Silver Economy Congress, EFPSA Congress 2021, X Congreso Nacional de Alzheimer, II Ciclo de Conferências em Gerontología, 9 Congresso CEAFSA, which intended to explain and get feedback from the academic audience, also receiving support and valuable inputs.

On the other hand, one expert suggested that different kind of media cover should be considered, at least in those moments when media put the focus on isolation and loneliness, such as the International Loneliness Day (October, the 1st), and Christmas Season.

In a scale from 0-20, the EEC rated the **overall results** with a mean of **17.4 values** (ranging from 11 to 20), meaning that they considered project's quality is at expected levels - green traffic light (table 4).

Table 4

Overall results: values and RAG by EEC

EXTERNAL EXPERT	VALUE	RAG
E1	18	
E2/E3	18	
E4	11	
E5	18	
E6	18	
E7	20	
E8	18	
E9	18	

C) RECOMMENDATIONS ON THE EVALUATION PERIOD

The EEC indicated that the evaluation of the work done so far is very positive and that all the tasks established in the different work packages are being carried out on the defined dates. They only showed concern regarding the delay in the definition of the MOAI Challenges.

“There are only some deviations that we do not believe could have a significant impact, except for the delay in the definition of the "MOAI Challenges", that should be advanced.”

Given the project to be a "technologic based solution", the EEC think it would be appropriate to have more references to technology and digital solutions. Additionally, they shared that it would be interesting to explore ideas on how to avoid loneliness and to improve people’s health.

“Given that the project aims to develop a "technologic based solution", I miss more references to technologies aids, how old people use technology and how to provide a good technology experience to the target population.”

Furthermore, it was stressed that the MOAI LABS team must consider that there are many older adults who don’t have skills on technological solutions and part of them neither have the electronic devices to benefit from the technological solutions. In order to be inclusive, strategies should be developed to guarantee that the final product will fit different older adults’ profiles, specifically considering people with less digital skills.

MOAI LABS’ partners comments:

MOAI LABS consortium agree with these suggestions and would like to share some of the needs that were defined by older adults in the co-creation sessions. The need for personalization of solutions was stressed many times, because older adults need to access the content and use the tools according to their digitalization knowledge. The simplicity and ease of use of the solutions was another important need. Finally, many older adults also stressed the need of having solutions compatible with their usual devices, which can include phone and computer, but also television. All these needs will be considered when selecting and developing the technological solutions to combat social isolation and loneliness.

D) RECOMMENDATIONS ON FUTURE WORK

The main recommendations of the EEC regarding future work are:

- (i) To define MOAI Challenges.
- (ii) To make brief progress reports that can demonstrate the progress that is being achieved.
- (iii) To involve Degree, Master and PhD students in the activities, to help the consortium and, simultaneously, to enhance the scientific support and publications related to the project.
- (iv) To consider the difficulties that older adults may have when using technologies, which was considered a relevant risk for the final product. The EEC is aware that this risk is indicated in the risk analysis, but they emphasized that it was not considered and explored in the scientific review on loneliness and social isolation.

E) GLOBAL APPRECIATION

In the EEC's perspective, the MOAI LABS project seems to be achieving its objectives and using the methodologies planned, according to the objectives designed since the beginning. As suggested by one expert, to apply evaluation criteria thoughtfully (OECD, 2021) there are "*four potential elements for analysis: relevance to beneficiary and stakeholder needs, relevance to context, relevance of quality and design, and relevance over time*". All the dimensions seemed to be included and are relevant. The dimension of the project, the transnationality present on the partnership, and the different types of stakeholders involved foster the potential of MOAI LABS, "*ultimate significance and potentially transformative effects of the intervention*."

The EEC considered that the MOAI LABS project has progressed considerably, despite the constraints already pointed.

"In one year, the project has progressed considerably despite the difficulty of working with several teams in different countries and different languages. It seems that all the objectives set were achieved despite these obstacles. The added value

of these projects lie in the multi-cultural nature and in a methodology which takes into account scientific research and the expression of older adults.”

“We consider that the project is adjusting in a very adequate way to the work plan. The core activities of the project (scientific review, co-creation groups, etc.) are being carried out in an orderly manner. Only the delay in the definition of the MOAI Challenges can cause a deviation in the achievement of the objectives in the established time. The activated measures are consistent with the defined project and the work is being implemented appropriately.”

“The project is achieving its objectives in a way that show the resources are well being used. The project is doing the right things and the interventions/actions that have been developed coherent internally. The impact of the project is still too early to be evaluated, as well as the added value and sustainability.”

“The project is showing its efficiency as it is re-launching a good use of both economic and human resources, having achieved a good connection between the different partners involved.”

“In addition, the project has been able to identify the problems and clearly define the objectives. The internal consistency of the project is very high.”

The dissemination activities were also emphasized, although it was stressed that it would be important to explore ways to promote MOAI LABS value (more disclosure, in order to reach more people):

“The massive and progressive use of social networks makes it possible to disseminate the progress of the work and we can further improve this dissemination again.”

“The project needs to be more recognized. This is part of the work of the experts and particularly by contributing to the writing of articles in journals and the presentation of the results in international conferences. We can use our own website too.”

Project’s coordination was also appreciated, as well as the contacts between all the partners and the external experts. The main difficulty pointed was related with the different English capabilities (understanding and speaking), which makes it hard to follow everything and to provide accurate feedback and improvement suggestions (particularly during the EEC’s meetings).

In a scale from 0-20, the EEC rated the **global appreciation** with a mean of **16.13 values** (ranging from 15 to 18) – green traffic light (table 6).

Table 6

Global appreciation: values and RAG by the EEC

EXTERNAL EXPERT	VALUE	RAG
E1	18	
E2/E3	16	
E4	16	
E5	15	
E6	16	
E7	16	
E8	16	
E9	16	

F) CONTACTS WITH PARTNERS, STAKEHOLDERS, AND/OR PARTICIPANTS

EEC based their notes and evaluation comments on the execution reports and on the documents that have been produced by the MOAI LABS consortium, as well as on the perspectives/information shared within the meetings of the EEC. One expert also extracted information from social networks, such as LinkedIn and other social media.

Five experts asked for UAVR support for collecting additional information and/or to clarify some questions related with the feedback report.

3. FINAL REMARKS

The global appreciation of MOAI LABS activities' progress was very positive. Table 7 presents a synthesis of the results, considering the topics/categories under RAG evaluation.

As pointed by the external experts, "(...) the project was proceeding as expected, with a positive impact on the topic under study and applied to the population involved. This project has ensured apparent proximity to older adults and isolated people, ensuring the development and implementation of adequate strategies to mitigate the risk of isolation. The constant delays in the evaluation are easily recoverable and do not jeopardize the continuity of the project."

Table 7

Synthesis of the results

Measures	External Expert																Mean			
	E1		E2/E3		E4		E5		E6		E7		E8		E9					
	Val	RAG	Val	RAG	Val	RAG	Val	RAG	Val	RAG	Val	RAG	Val	RAG	Val	RAG	Value	RAG		
<i>Fulfillment of the work plan</i>	17	●	18	●	15	●	10	●	16	●	20	●	16	●	16	●	16	●	16	●
<i>Correlation between the progress of the activities and what was defined in the AF</i>	17	●	20	●	15	●	17	●	16	●	20	●	17	●	16	●	17.13	●		
<i>Overall results</i>	18	●	18	●	11	●	18	●	18	●	20	●	18	●	18	●	17.4	●		
<i>Global appreciation</i>	18	●	16	●	16	●	15	●	16	●	16	●	16	●	16	●	16.13	●		

Furthermore, considering the EEC feedback, in order to improve the activities' progress and the operational objectives of MOAI LABS it should be considered:

1. *To review the communication plan and reinforce the activities' dissemination*
 - Continue to invest in events' participation (particularly the scientific ones) to publicize the project and the results obtained so far.
 - Engage students in these activities (particularly in supporting the production of scientific outputs).
 - Define strategies with the support from the Scientific Committee of MOAI LABS.
2. *To conclude and to improve the scientific review on loneliness*
 - To conclude this document as soon as possible.
 - Give the document a more structure approach, and enriching it with more current and evidence-based references.
 - Include references that explore the resistance to technology use by older adults, less digitally-skilled and illiterate people, and strategies used.
 - Research in databases such as Scopus and Web of Science is suggested.

In order to facilitate EEC work and to contribute with more suggestions, it should be considered the following issues:

- Have access to the deliverables/documents produced by the MOAI LABS team.
- To promote more informal meetings between the external experts, so that they could share more information and perspectives, aiming to promote a more collaborative work.
- To make brief progress reports that can show the progress achieved.