



Transnational Evaluation Framework
LEARNING VIRTUAL SAUNA
Proposal by P.Lintula/eTampere 23.5.2003

Rationale

The evaluation will be concerned with assessing the impact (quality, value and importance) of the transnational activity in the context of Equal partnership.

Stakeholders in the evaluation process:

DP partners, transnational partners, policy makers [national and EU level], funders and project sponsors, programme managers [Managing Authorities and National Support Structures], target groups and those discriminated against.

Questions

Questions to be used in the evaluation will be discussed in detail by the TMG meeting in June 2003. Preliminary ideas:

Have the transnational activities been carried out [planned, managed, executed] well? [quality]

Did the transnational partnership and programme make some useful contributions to local or regional policies and practices [through partner DP's] over and above its costs? Has it added value to national activity? [value]

Has the transnational partnership been successful and significant both in terms of making a substantial contribution to your DP's overall strategy and in terms of delivering positive impacts – especially in terms of contributing to changes in labour market policies at national or European levels? [importance]

Did the transnational partnership explore the right issues and problems and what relevant equal issues have emerged? [impact]

How relevant has the TCA been as a document to support transnational co-operation? [process]

How effective has been the process [management of activity] of transnational co-operation within the Learning Virtual Sauna? [process]

Methodology

We propose to assess the impact of actions generated in the transnational framework of the Equal partnership as follows:

- a) By gathering information from the stakeholders of the project (forehand from the active players but also from target groups)
- b) By aiming to filter disturbances from the gathered material. Here Igor Ansoff's filter theory, which bases on weak signal concept will be used. (Theory described in annex)
- c) By gathering information mostly using web tools benefiting from www-technologies and connections.
- d) By conducting two or three mid-evaluation and a final evaluation.
- e) By agreeing of assessment methodologies with the transnational management group.

We propose following working method and steps:

a) Gathering information

Participants will be invited using e-mail (pre-warning, if necessary by phone, in meetings). Recipient will get www-link to the Weak Signal Tool. She/he will be asked opinions on the activities in the project context. Questions will be developed by Finland and fine-tuned with other consortium members. Answering to questions will take about 15 minutes. Maximum 100 participants can be handled by the system.

b) Assessing activities

Gathered signals will be presented using www-tool to all participants and they will be asked to assess the importance of diverse project activities. In this assessment also experts and members of target groups can be invited which have not participated in the actual signal gathering. Answering happens in Internet and takes about 15 minutes.

c) Impact analysis

Tool produces a report, which raises up strong activities (participants have similar opinion) and weak activities (participants have diverse opinions). These results will be analysed using Delphi-method in a half-day meeting, of experts where gathered data will be compared with the objectives of the project.

d) Reporting

The evaluation reports will consist of signals gathered and processed by assessment and impact analysis in the workshop. Annexes to report will be signal gathering reports (matrix relevance/deviation, grid).

As a whole one evaluation takes about three weeks. We propose to have one evaluation in Autumn 2003 and one in Spring 2004 and the final one end of 2004.

Each partner will nominate an evaluation lead researcher who will work in partnership to undertake the evaluation of the transnational partnership led by Finland. This group will meet when each of the transnational working groups meet. They will identify a work plan that will progress this evaluation framework.

The innovation in evaluation will come through the use of the electronic tool called Weak Signals Tool. Description of this tool is annexed to this proposal. This tool will also be managed by Finland.

The evaluation group will undertake an initial baseline study [Ex-ante]. The aim of this baseline will be to establish a starting point for to enable the assessment of outcomes and impacts of transnational work.

The final evaluation report will be available by February 2005.

Responsibility

Members of the transnational partnership will carry out the transnational evaluation internally with representation from each of the national partners. The Associate Partners in Tampere Finland will have the responsibility for managing the production of the transnational reports and co-ordinating other partners contributions.

Annex 1

WEAK SIGNALS TOOL

The Weak Signals tool is designed for continuous monitoring of operating environment in large organizations. With help of this web-based tool, the company can collect weak signals¹ in an efficient and easy way.

Developed together with multinational corporations with strong theoretical background

The need for developing a modern environment-scanning method arises from the growing complexity of the companies' operating environment. Classical foresight methods are heavy and/or time-consuming and do not necessarily comply with the demands of today's fast-moving companies. The Weak Signals concept was developed together with Fountain Park's multi-national key customers. After about 14 installations, we feel confident that the concept is unique and brings new value to processes involving vision and strategic management scenarios.

The Weak Signals concept lies on sound theoretical background, combining Delphi methodology, weak signals theory and the latest filtering theories. Igor Ansoff's filter theory identifies three different filters that prevent external weak signal absorption in a visioning or scenario process. One of the main advantages of the tool lies with its ability to reduce the effects of cognitive and power filters. The Weak Signals tool also applies key issues from Karl Weick's sense-making theory. Weick has analyzed the nature of those signals that are able to pass through these filters. The strong theoretical background is necessary, owing to the fact that the Weak Signals tool in itself can be rapidly implemented and is easy to use. The theory part aims at highlighting the validity and credibility of the results.

Easy-to-use tool with multiple functions

The web-based Weak Signals tool is primarily developed for the creation and analysis of weak signals. It is applicable in different planning processes involving for example corporate vision and strategy as well as R&D.

The advantages of using the Weak Signals tool are for example following:

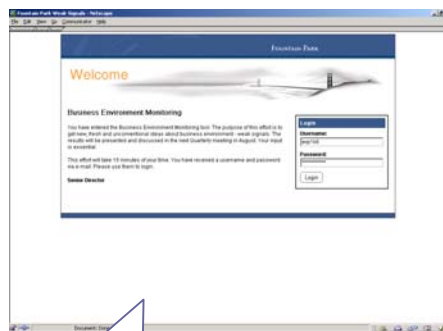
- A compatible means for collecting tacit and emotional material
- Fast on-line evaluation of weak signals by a large amount of participants

¹ A weak signal is a factor for change hardly perceptible at present, but which will constitute a strong trend in the future Michelle Codet 1994:59

- An effective way to replace the most time-consuming (expensive) parts of traditional Delphi methods
- User motivation enhances with a novel method of analysis
- A generic tool – independent from subject and content, can be used on different issues under consideration
- Technical requirements: only web-browser needed.

The collection, evaluation and reporting of Weak Signals in brief

The Weak Signals process has three steps: signal input (20 min), mapping (15 min) and, if required in between, signal filtering by a facilitator.



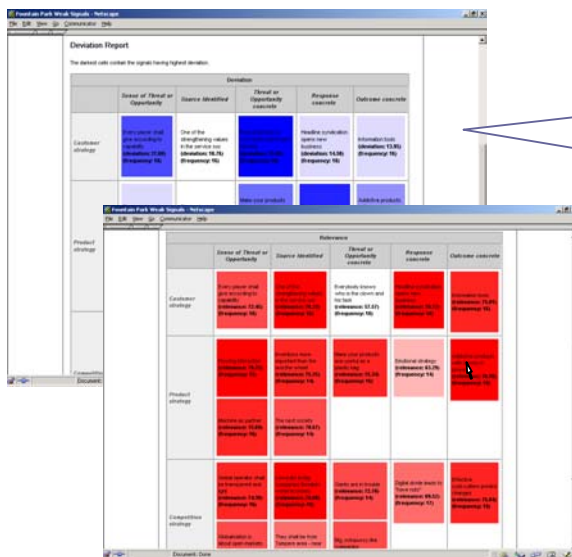
E-mail invitation to the participants,
Background variables information



Three input templates –
story format
- creative problem
solution process model

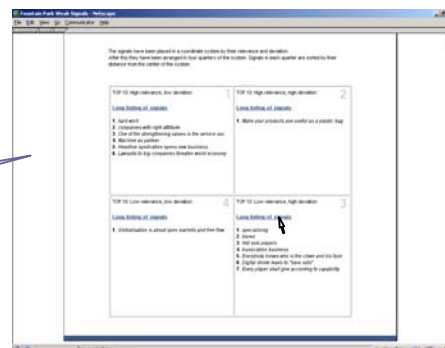
Cognitive map evaluation:

- relevance to the reflected issue
- intuitive reflection process
- unedited stories



Matrix reports – more intensive
 ...red color, more relevant to the issue > current mental model/trend issue
 ... blue color, more deviation in opinions > dynamic issues (emerging or dissipating signals)

Grid report
 Potential weak signals



Some references

Shell Finland: “We were able to get new insights and to locate extremely interesting emerging issues. With help of these our strategic issue management grid turned more informative and was a big help in reporting to the global management.”

Nokia Research Center: “The output material from the new vision process had a wider variety and the discussion process was extremely interesting. We were able to uncover important phenomena in the business environment.”

Nokia Mobile Phones: “We use the tool to identify discontinuities that possibly to challenge the current vision statement”.

Technology Development Center of Finland: “We reached our aim which was to develop and improve the technology programs, to set clearer goals and to generate new ideas.”

Finpro: “ The objectives for our pilot project with the tool are to discover new potential issues that may have radical impact on the Finnish mobile industry.”

European Union – Prometheus programme: “Creating a dynamic understanding on what is going on in the e-learning industry world-wide”.