



## Project Mégapoles

Network of European Union Capitals  
for Health Promotion and Prevention

# Growing Old in Metropolitan Areas

„Mega View“ Manual



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## Instruments for successful transfer of know-how within the city network: MegaView Tool and Manual

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Within „Mégapoles“, the Public Health City Network, the participating cities want to exchange strategies and programmes of successful health promotion for certain target groups, in order to profit from various experiences gained in cities of the European Union and Oslo and to develop an European perspective.

To make these experiences usable for the network, an evaluation instrument has been developed: „MegaView“. This method aims at involving experts in the practical process. „Peers“, experts from different fields of the health care system, visit projects in other European cities and discuss on site with the persons and collaborators involved about objectives, activities, methods and management of these projects. They do this on the basis of information about the project and relevant framework conditions, which have been made available to them before the visit.

For a successful designing of such process, good preparation and organization is needed. For this purpose, two instruments have been developed: an evaluation questionnaire\*, which provides the content-related framework conditions for the evaluation and serves as a tool for collecting and making use of information, and an evaluation manual\*\*, which offers a guideline for process design and process management of the evaluation method.

### MegaView: Main features

**Objective:** evaluation of projects for health promotion and prevention in cities

**Method:** peer review using an evaluation structure according to the target definitions of the city network Mégapoles and a manual for process design and process management

**Outcome:** the results of the evaluation can help decision makers in the health care system to judge the effectiveness, sustainability, and transferability of projects and decide about further development. Results can be used by project providers as a tool for quality improvement.

**Target group:** politicians, decision makers, project managers

\* The evaluation has been developed by an expert group from the Mégapoles network in the course of two workshops and with the expert advice of David Evans, University of Southampton.

\*\* The development of the evaluation manual was based on the experiences of the peers who have used the evaluation method for the first time within the sub-network “Growing Old in Metropolitan Areas”.

## Directives within the „MegaView“ project review

### Basic principles for reviews

- ★ Reviews are a learning process and not a formal external evaluation
- ★ The projects participating should benefit from the review (provision of all evaluation results, possibility to discuss with the peers, feedback from the city network)
- ★ Agreements with projects must also include agreements on the confidential use of information (project has the opportunity to approve drafts for public reports)
- ★ Compiled data and reports for/from the review are made available to the project

### Basic concept of the evaluation

The evaluation method has been developed for practitioners and does not aim at scientific outcomes. The results should provide help for decision makers in the health care system and lead to recommendations for the evaluated projects as well as for projects to be developed. This especially:

- ★ With respect to usability and feasibility of other strategies/process designs for own projects/programmes
- ★ In order to identify enabling factors and obstacles for the project and for the success of the project
- ★ In order to reach disadvantaged population groups

### Instruments of evaluation

For the evaluation, two basic instruments are needed:

- ★ **The „MegaView Review Tool“:** a questionnaire consisting of two parts:  
Part 1: Description of project, filled out by the project before review  
Part 2: Peer Review Evaluation of the project. Filled out by the peers during and after the visit.
- ★ **The „MegaView Manual“:** a guideline how to organise the process

## The „MegaView“ Manual

The manual provides a guideline how to organise the evaluation. The review process consists of four basic phases:

- ★ **Phase 1:** Assessment of preconditions for evaluation, examination of feasibility and acceptance
- ★ **Phase 2:** Preparation
- ★ **Phase 3:** Project visit
- ★ **Phase 4:** Reporting and dissemination of results

### Time needed

In total, the evaluation process requires a period of 3 to 3.5 months. Main part of time is needed for preparation:

Phase 1	Phase 2	Phase 3	Phase 4
Collecting pre-information and material	kick off meeting for peers, preparation	Evaluation	Reporting
Steps 1-4	Steps 5-13	Steps 14	Steps 15-17
2-3 Months		3 Days	2 Weeks
Total time: 3 to 3.5 months			

The four phases are divided into 17 process steps. In the following, they are described separately and the respective activities (including recommendations from reviews which have already been carried out) are listed. In this way, the manual provides a checklist for the whole evaluation process.

### Do not forget...

- ★ The evaluation process has been developed for supraregional use, but is also suitable for use within local level. To this end, we recommend **to check if all relevant questions are covered in case of need**, and to make additions and/or adaptations, if necessary.
- ★ The open dialogue between project and peers constitutes an important part for the success of the evaluation, as well as a common understanding within the peer group. The **consideration of social processes** within the collaboration turned out to be a factor for success (The possibility of open discussion during informal situations is an essential part. **Social events** like, for example, dinners together offer this possibility.)
- ★ When comparing the different cities, it is of great importance to **consider the cultural, social and system-related context**, in which a project or programme is being developed. These context variables should be described as precise as possible, in order to ensure an adequate understanding.

## Phase 1 Assessment of preconditions for evaluation, examination of feasibility and acceptance

### Step 1:

#### **Define target area, target group and intended outcome of evaluation**

A precise definition of objectives and intended results beforehand avoids difficulties of delimitation during the process and the creation of unrealistic expectations on the part of the project participants.

### Step 2:

#### **Select project and recheck acceptance for the project**

The evaluation aims at a common learning process. That is why the acceptance is an important requisite for further collaboration.

### Step 3:

#### **Clarify resources and acceptance of evaluation organisers/sponsors**

Important decision-makers should be involved from the beginning. A precise statement of objectives and expected results provides the basis for a clear allocation of tasks on the part of the relevant contractors.

### Step 4:

#### **Constitute peer review group**

Experience from reviews carried out until now recommends an interdisciplinary team. The peer review group should consist of 3 - 5 people (max.)



## Step 5

### Kick off meeting of the peer group and clarify roles and responsibilities

Aims of the kick off meeting are:

- ★ *Constitute peer group*  
The social dynamics within the group has to be taken into account. Peers should have the possibility to get to know each other (exchange of views and expectations, professional background, knowledge of chosen issue etc.)
- ★ *Define roles and responsibilities within peer group*  
Within the peer group three responsibilities have to be defined. Besides the peer function (peer), someone who organises the peer review visit is needed (local host/organiser), as well as people who take care of reporting (rapporteur/chair). The local organiser may be one of the peers, but you can also nominate a person who is not included in the evaluation.

	Qualification	Responsibility
1. Peer	Professional in the field of health and/or social services	Evaluator
2. Local organiser	Is familiar with the health and/or social services in the city where the project is located	Local organiser fo visit In-between between peer group and project Provides background information both for reviewed project and reviewing group
3. Rapporteur/ chair	Skills in dissemination, reporting	Responsible for products (report, information material)

## Step 6

### Inform the project about content, process and organization of the review

In the preparation phase the project receives information on framework conditions and organization of the review:

*Framework conditions:*

- ★ The project will benefit from the peer review (sharing information with other professionals)
- ★ Basic principles for reviews (learning process and no formal external evaluation)
- ★ The project and not the persons working in the project are reviewed

*Organization:*

- ★ Define date of visit and agenda.
- ★ Define programme of the visit, which consists of three parts: oral presentation of the project by project managers - site visit (e.g. day centre) - discussion with peers and project managers.

The project defines the collaborators who should be present at the peer visit. It is important that one representative from every unit or work field is present (e.g. psychologist, medical doctor, budget expert(s), maybe clients, volunteers)

### Step 7

#### **Background information for the project regarding peers**

(target definition, professional background of the peers)

To enable the project to prepare for the visit, give them some background information about:

- ★ The professional background of the peers (city, education, familiarity with context)
- ★ Documents about Megapoles
- ★ Special interests of peers
- ★ MegaView Part 1

### Step 8

#### **Prepare Part one of MegaView together with project**

Preparation of MegaView Part 1 has to be carried out by the project together with a representative of the peer group (local organiser), in order to ensure the understanding of the peer review process and structure.

### Step 9

#### **Set agreements on dissemination of reports/results with project managers**

The MegaView report will be written by the peers and has to be approved by the project. Preparation includes agreements on target groups of the report (e.g. health politicians, project managers, European Commission etc.)

### Step 10

#### **Define responsibilities within reviewed project**

The project manager should assign following tasks:

- ★ Coordination
- ★ Oral presentation of the project
- ★ Showing around during site visit
- ★ Organization of room for meeting with peers and facilities for presentation (overhead, flip chart)

### Step 11

#### **Make time table and agenda and check with peers**

Try to set the final date and agenda as soon as possible in the process. In case of reviews taking place in different cities, be aware of costs for travelling and accommodation (e.g. cheaper apex-tickets, when the night from Saturday to Sunday is included - this may influence your time table).

- ★ Try to involve stakeholders and decision-makers in the meeting.
- ★ Arrange a social event.



A recommended time table is:

	<b>Day 1: Arrival of peers</b>
2 pm - 6 pm 7 pm	First meeting with peers Dinner together
	<b>Day 2: Project visit and first evaluation session</b>
9:30 am - 11:30 am 11:30 am 12:30 pm - 1 pm	Oral presentation of project, discussion Lunch break Show around the site Optional: Do some other site visits to see other projects in the field. This may help to clarify the position of the project within a broader context.
2 pm - 6 pm 8 pm	Second meeting with peers Dinner together with politicians, experts in the field
	<b>Day 3: Drafting the MegaView Report</b>
10 am - 1 pm	Third meeting of the peers

### Step 12

#### Collect information for peers regarding city and project

(e.g. demographic data, morbidity/mortality rates, city health policy, position of project etc.)

Project information is already provided in Part 1 of MegaView. Additional material like e.g. organogram, evaluation data, folders etc. is recommended.

### Step 13

#### Send information to peers

Make sure that all the information is given to the peers at least two weeks before the visit so that there is time to go through all the material.

- ★ City report
- ★ Project description
- ★ Information on organization (accommodation, transport, time agenda)



## Phase 3 The project visit

### Step 14

#### Peer review: common preparation, project visit, concluding agreements

The three-day visit of the peer group is divided into the following:

##### Day 1: Arrival and preparation

- ★ Work through MegaView Part 1 that was filled out by the project
- ★ Work through all the material that was worked through by the peers
- ★ Clarify open questions
- ★ Recheck time table

##### Day 2: Project visit

- ★ Project presentation and discussion
- ★ Site visit(s)

##### Day 3: Project evaluation by peers

- ★ Discussion of peers and formulation of first evaluation results
- ★ First reporting



In phase 4 reporting takes place, together with another recheck with the project and planning of a strategy for public relations work/transfer of gained information. This is divided into three final steps:

### Step 15

#### Agree on process of finishing the MegaView report including time table

*Make time table for reporting:*

- ★ When the MegaView report will be drafted
- ★ Deadline for approval from peers
- ★ Deadline for approval from project

*The chair of the peer group is responsible for:*

- ★ drafting the MegaView report with the material produced at the meeting
- ★ sending the draft MegaView report to the other peers
- ★ sending the draft to local organiser and to project, after approval from other peers

### Step 16

#### Recheck report with project

- ★ Pass on the draft MegaView report (with comments) to project
- ★ Give opportunity to meet and discuss
- ★ Ask project for supplement documentation, comments, remarks

### Step 17

#### Disseminate Results

In the final report it should be taken into account that one objective of the review is to provide help for decision making. It should, therefore, include, apart from description and evaluation, two main points:

- ★ a set of the main results
- ★ a set of concrete recommendations related to practise for the project and with respect to transferability (within the city and/or between cities)

# „Mega View“ Manual

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