



Education and Culture DG



ISTITUTO ROMANO DI SAN MICHELE

## Lifelong Learning Programme

AMISL project - Active Model for Improvement and Self Learning  
134528-LLP-2007-IT-GRUNDTVIG-GMP

# ACTION RESEARCH

## REPORT



Valorização Intergeracional  
e Desenvolvimento Activo



## 0. Premises

In accordance with the General Project Planning, The Research Stage based on the Research-Action approach was activated on November 2007 just after the Oporto Kick off meeting (26-27 November 2007). The steps of the first Research Stage planned up to September 2008 were the following:

- 1) Planning of the Research: Arrangement of the distinctive tools of Research-Action, to be used at the partners Project seats (Rome, Oporto, Patrasso, Prague):
  - Study and testing stage;
  - Tools achievement;
  - Forwarding of the tools to the partners and feedback collecting;
  - Tools correction and ultimate tools forwarding.
- 2) Research implementation at the 4 head departments of the AMISL Project partners: in Rome, Oporto, Patrasso, Prague:
  - Setting up of the research groups;
  - Starting up and research development
  - Outputs synthesis as a report
  - Forwarding of the output to the leader partner IRSM;
- 3) Testing of the outputs and of the relative reports:
  - Outputs synthesis;
  - Presentation of the research outputs to partners;
  - Developing of the first experimental tools for the testing of the formative needs, surveying of informal and not formal knowledge, self-appraisal of the services and starting up of the second experimental research stage.

☞ **The purpose of this stage**, known as *bottom up*, was to figure out the indicators, the testing criteria and the knowledge, necessary to elaborate new models for the self appraisal of the services quality and new models of testing the formative needs. These models, at the present time still in experimental phase, correspond to the Project *deliveries* that is to say with:

- The service appraisal model with its relative tools and guidelines;
- The model for the surveying of the formal, informal and not formal knowledge of the operators who work in the field of the services addressed ,to the elderly people with its relative tools and guidelines;
- The model for the surveying of the formative needs of the operators who work in the field of the services addressed to the elderly people, with its relative tools and guidelines.

The following notes mean to illustrate the plan followed, the activities developed by the leader partner as central coordinator and by each local partner and the outputs achieved compared with the initial aims.

## 1. Research planning

The research planning was developed by the Project researchers of the Roman Institute of San Michele (IRSM) and cooperative society San Saturnino, and was coordinated by the functional foreman for the Project dr. Gabriella Fabrizi, member of the Roman Institute of San Michele.

### 1.1 Testing and study stage

As in premises, this sub-stage has been set up on December 2007, just after the kick off meeting that marked the beginning of the Project activities shared by partners.

According to the data and to the considerations mentioned in the AMISL Project and introduced to the competent authorities for the appraisal of the supplied documentation, a research was started strictly limited to the methodological detail and inspired to the approach of the research-action.

Therefore, from the beginning, it has been carried out a careful bibliography research on Italian literature with the support of the available English texts, making sure to collect also the more recent articles available on web. The main difficulty related to this stage, was represented by the fact that the research-action, as a methodological research approach, is strictly linked mostly in the school and educational environment. Therefore, the main part of the experience report of research-action moves within the orbit of didactics and pedagogy, while very scarce is the contribution of experience and of scientific reports in the field of the services to the people, particularly to the elderly people. Besides this limit faced at once, confirmed us the originality of the experience set up by the partners as a consortium.

The main useful output of the research was the retrieval of an essay about the research-action, written by Anna Aluffi Pentini, a roman researcher by roman "Roma Tre" University, Faculty of Educational Science. The essay titled, "The research-action synergy drive between theory and praxis" (A. Aluffi Pentini: 2001), was very useful to set in a methodological way the research, providing information and suggestions upon the more suitable tools to adopt during the implementation stage. Moreover, while the author lives and works in Rome, it was possible to contact and meet her and acquaint her of the Project, gaining useful suggestions for the general asset of the research.

While the research-action is a methodology typical of the social research which may be unknown to many people, we hold necessary and also useful to elaborate a document for study purpose, quite thick, for all partners use, in order to explain some fundamental methodological aspects, and to set in a more precise and wide way compared to the Project, the research activities in the specific field of the services to the elderly people.

This document that includes a general introduction to the methodology of the research action and in particular a focus on the chosen tools, gave the theoretical basis to the Focus Groups.

☞ This document titled "**GUIDELINES TO THE FIRST STAGE OF ACTION RESEARCH**", supplied to the partners on the 11th of February 2008 and published on the web at the address [www.amisl.org/Project](http://www.amisl.org/Project) (partners reserved area) was the first output of this research sub stage.

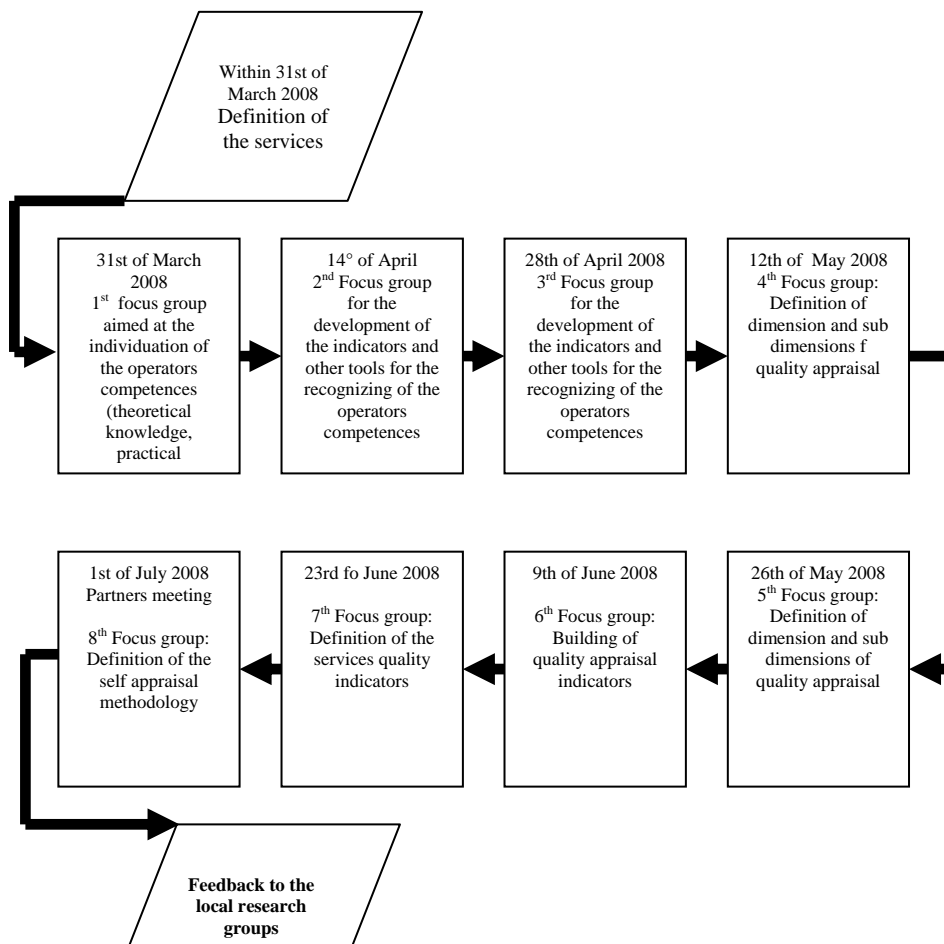
### 1.2 Tools achievement

The second step was represented by the concrete elaboration of the tools for the testing and the research that each partner should adopt in the stage of research implementation and by the scheduling of each step, common to everyone, as a component of the research. This second output of the sub-stage was named "**Road map**". It has been elaborated a document that

includes a clear and well defined plan of the next meeting of the Focus Groups, pointing out clearly the times and the conditions of the implementation.

The provided Focus Groups were initially 8. Each Focus Group should last 45 minutes/1 hour. The groups should have been composed by 10, 15 participants each, chosen among persons representative of all the categories and of all the professional figures operating in the services from the managerial levels to the direct operators.

This planning provided from March to July 2008 was equipped with the following tools: a general introduction to the Focus Groups (adopted methodology, tools, time for each focus group, professional figure to involve in the Project) and with 8 cards: one for each group:



- ☞ The output of this stage was a document submitted to partners on the 4th of April 2008 by means of publication on the web [www.amisl.org](http://www.amisl.org), (partners reserved area) named "**FOCUS GROUP GUIDELINES**".

### ***1.3 Feedback collection and final adoption of the research plan***

Between the 4 and the 24 April 2008 occurred the collection and the testing of the tools feedback conceived by the partners. A difficulty that came up at once was the methodological complexity of the conceived tools, that need to be explained by means of a workshop. Yet because of the expected costs of the aforesaid workshop, which could not be borne according to the overhead expenses, it was provided, to an integration of the supplied documentation and to the increasing of e-mail and telephone communications between the Project coordinators and the partners. Besides the document draft has been quite simplified especially with reference to the cards for the Focus Groups working out. Finally the number of the Focus Groups was reduced from 8 to 6 that have been included in the guidelines with the relative cards.

The document titled "**FOCUS GROUP GUIDELINES**" has been finally adopted the 24th of April 2008 by means of publication in the web site [www.amisl.org](http://www.amisl.org). (partners reserved area)

## **2. Implementation and research achievement by the partners seats in Rome, Oporto, Patraso, Prague**

On the 24th April 2008 it has been officially activated the Research Action by the Project seats of the following partners: Roman Institute of San Michele (with the support of the researchers of the cooperative society San Saturnino), VIDA, HRDC and ŽIVOT 90.

Each partner was able to participate with a quite large number of members to the provided 6 Focus Groups. Unfortunately this difficulty caused a delay in the starting up of the research that was activated between the 10 and 31st of May 2008. The Focus Groups, consequently, took place in June.

All the partners were able to complete their Focus planning within the 1 July 2008, date of the verification meeting in Prague at ŽIVOT 90 head office, with the sole exception of HRDC, that ended the Focus planning and the sending of the reports during the month of July 2008.

*(see attached the reports of each partner)*

### ***3. Testing of the outputs and of the provided reports***

As specified, this first research stage effected through the 6 Focus Groups, was ended by all partners between June and July 2008. Each partner, according to the “**FOCUS GROUP GUIDELINES**”, provided to elaborate a report on each Focus Group and submitted the report by e-mail and by the publication on the web site [www.amisl.org](http://www.amisl.org). (partner reserved area).

#### ***3.1 Output synthesis***

The output synthesis has been elaborated by the IRSM coordinating group and by the researcher San Saturnino during the months of July and August 2008 through an in depth study of the documents and of the submitted reports locally by each partner on each Focus Group and through an outputs comparison. The main methodological difficulty faced was the comparability of the outputs. The research action as a matter of fact is based on an approach of social research typically based on a qualitative output collection that makes particularly difficult to generalize the outputs and extend them to a wider field of research that within the Project is represented by the whole context of the care services for elderly people in Europe.

However this difficulty was known to the coordinators who elaborated the AMISL Project on March 2007 with the contribution of the other partners giving to it the actual and fundamental methodological formulation. The complexity in the outputs comparability is however counterbalanced by a number of advantages of the effected research such as the high level of adaptability in the different contexts and the pragmatic consequences that the research action is able to produce in the contexts of its application. Therefore the outputs, which are not only and just theoretical, must be analyzed in their capacity in giving rise to awareness in the research work groups. This critical awareness represents both a dimension of cognitive acquisition, both a first important element for the self improvement of the services. In this sense, all the partners confirmed in their reports the importance of the developed work in terms of direct and personal involvement of the operators and in terms of mobilization of the cognitive, motivational technical and practical resources towards the self improvement of the work groups.

Also with reference to the theoretical and cognitive outputs, the developed activity was useful and accordance with the initial aims. As a matter of fact it was possible to isolate, through the

comparison of the research outputs, the principal indicators and dimensions to be used in the models elaboration for the following purposes:

- The self appraisal of the formal and informal competences of the operators;
  - The testing of the internal formative needs;
  - The services self appraisal.
- ☞ The output of this stage consists therefore in the definition of the above said indicators that have been utilized for the elaboration of the first experimental model to be adopted in the second research stage activated on the 17 September 2008 by sending (both by mail and by publication in the web site [www.amisl.org](http://www.amisl.org) - partners reserved area-) of the new tools.

### ***3.2 The achievement of the new tools and the starting of the second experimental stage of the research.***

Between August and September 2008 the IRSM central coordinating group, with the support of the researchers of San Saturnino, provide the elaboration of the new tools to be adopted in the second Project experimental stage addressed to the testing of the new models for the self appraisal of the competences, the surveying of the formative needs and the services self appraisal.

These tools support the implementation of the self appraisal and organizational self testing cycles in accordance to the above said profiles to be achieved at the partners services in Italy, Portugal, Greek, Czech Republic

As for the precedent stage of elaboration of the research tools described in point 1.2, it was provided a “kit” of tools correlated one to the other that provide, in this case, as well as group sessions on the Focus Group model, also individual interviews to operators and workers.

The “Kit” has been submitted to the partners asking them to provide eventual suggestions and adjustments or explanations within the end of September. Also this “Kit” needs some corrections and partial remaking in order to elaborate tools more suitable to the needs and to the different research contest where to be implemented.

☞ **The output of this stage was the final adoption in October 2008 of the new “Kit” named “GUIDELINES TO THE SECOND PHASE OF THE ACTION RESEARCH”, consisting of the following tools:**

- **Surveying of the knowledge and of operators formal and informal competences:**
  - Tool no. 1 – **Interview schema**: this tool is aimed at making a first acquaintance between the interviewee and the interviewer/counsellor. The interview concerns: personal data, background work, starting and current motivations in working, problem solving strategy etc.
  - Tool no. 2 – **Guidelines for a worker autobiography**: this tool consists in an interview schema, concerning the existential experience of the worker, including his education, his interpersonal relations, his values etc;
  - Tool no. 3 – **My competences**: this tool is a guide for the self detection and testing, containing a graphic (the “genealogical tree”) to be fulfilled by the interviewee. The “genealogical tree” concerns a reflection about the formal, not formal and informal learning, according to its “birth” and context of discovery: from the remote ones up to the last learning; the learning linked to the family or to the work environment, and so on;

- Tool no. 4 – **Personal Project**: this tool is aimed at helping the worker to achieve several aims, such as : to develop his competence; to obtain a better working environment; to identify some aims of improvement; to find a more satisfying job. These objectives must be correlated to tools, resources, time, and choices;
- Tool no. 5 – **Portfolio of competences**: this tool is aimed at the synthesis and collecting of the various documents and elements which form the job competences. In this sense, it looks like an index, and ends the self-testing of competences.

o **Services self appraisal: Proposal for Dimension, Sub-Dimension and Indicators**

The “Kit” “**GUIDELINES TO THE SECOND PHASE OF THE ACTION RESEARCH**” includes also a first planning of the experimental research in the form of a Road Map, with reference to the surveying of the knowledge and of the formal and informal competences of the operators. During the present days we have been planning in detail the stage of experimental research for the services self appraisal:

