



**CAENTI**  
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## Coordination Action of the European Network of Territorial Intelligence

**Guidance notes for the use of  
CATALYSE information and tools.**  
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**Deliverable N° 56**

**Part III**  
**Data analysis protocols of the guide**  
**Uses of CATALYSE in development partnerships**  
**Conclusion**

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## ***5. DATA PROCESSING PROTOCOL OF THE EUROPEAN GUIDE***

This chapter presents data processing protocols according to the protocol established for PRAGMA (deliverable n° 54):

- Suppression of bad quality questions (for memory);
- Coding of the open questions
- Recoding of the closed question
- Selection of characters for the qualitative data analysis.

These protocols were elaborated by the research coordination group wp6g “guidance” starting from the experiences of the observatories of CAENTI. In ALBA IULIA the wp6g group decided to start from the last diagnosis worked out by the observatories of Odina (ACCEM), Opasi (ACCEM), Opagu (ACCEM), OPTIMA, INTEGRA and ADAPEI. COCAGNE that do not make individual diagnosis was associated with the discussion as other partners.

We present here a first digest of the confrontation of these flashbacks according to the European guide.

It remains incomplete because it is difficult to synthesize flashbacks starting from different guides in very different contexts. It actually precises:

- All the elements we need to define the technical specifications of the collecting tools
- The basic elements for coding and recoding, as codes
- Elements about the aim of the data analysis concerning the pertinence and the interest of each question
- Guidance notes about technical aspects of data analysis.

This work will be pursued with the results of the six experimental diagnoses of ACCEM observatories, old partnerships and new ones. The data are actually collected with “migrants” guide, which included the most of the questions of the European guide. So we will be in condition to better distinguish the specific results from the global protocols and to precise more the recoding aspects and the selection of characters.

Afterwards we will define the protocols of the repertory. One part of the repertory information corresponds to the guide questions. So we have to precise the

protocols for confrontation, and the protocol for the other special information of the repertory.

We will also precise later the comparison with the territorial indicators, when the selection of these last ones will be given.

About the data analysis protocols of the guide, those are essential before the other information, we present the following columns in a sheet organize of which lines are the questions of the European guide with the same blocks organization:

**Code (Cod.):** question code.

**Descriptor:** stated for inclusion in the file.

**Type of Questions (Q):**

Open (O)	Measure (M)	
	Text (T)	
Closed (C)	Nominal (CN)	Dichotomic (CND)
		Categorized (CNC)
	Ordinal (CO)	
	Gap (CI)	
	Reasoning (CR)	

**Type of Response (R):**

Responses	R	Modalities that can be chosen	Responses that can be chosen for each modality
Exclusive	E	One	One
Unique	U	Several	One
Multiple	M	Several	Several

**Categories (C):** Number of categories.

**Reason:** Justification of the appropriateness of each descriptor. It indicates the usefulness of the information asked.

**Observations/Recommendations:** Technical observations and/or recommendations for the exploitation of the data.

<b>ID AND TERRITORIAL INFORMATION</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>C</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Us	User	A	E	-	It identifies the person who the data collected by the document refers to.	User identification code. It is advisable for this code to be automatic to avoid duplicity. It is advisable for it to provide information on the individual (e.g.: adding a sex code, young/old, service, territory, etc.).
St	Structure	CNC	E	Table	To be able to establish specific balances of each structure.	Regrouping allowed if it is necessary to analyze groups of several structures.
Ac	Action	CNC	U	Table	To know the users who are assigned to that programme and establish specific studies by programme.	Regrouping allowed if it is necessary to analyze groups of several structures.
Re	Referent	CNC	E	Table	To identify the person who guides the user from the organization to establish coordination lines or to make evaluations of each job post.	Regrouping is allowed to analyze the action of groups.
Rc	With is your residence country?	CNC	E	Table	To be able to locate the results in a territory and intervene in it.	Regrouping allowed. By regrouping modalities it is possible to conduct analyses in different territorial districts. It allows cartographic representations.
Rr	Which is your residence region?	CNC	E	Table	It is advisable to collect the data in small territorial units to avoid conditioning the territorial analysis.	
Rm	Which is your residence municipality?	CNC	E	Table		
Rd	Which is your residence district?	CNC	E	Table		
Fr	Date of first reception	A	E	-	To know the exact date when the intervention project with the user starts.	Regrouping not allowed. Being a fixed date, it can be used as a reference to calculate other variables.
De	Who has derived you to our entity?	CNC	E	4	To identify the user's ways of access to the organization.	Regrouping allowed.

<b>INFORMATION ABOUT INITIAL RECEPTION</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Ge	Which is your gender?	CND	E	2	To make a quantitative and qualitative analysis according to the user's sex. There are many active policies that use sex as a transversal axis. It is necessary for individual diagnoses.	Regrouping is not allowed. It is a cross variable, necessary for group and individual diagnoses.
Db	Which is your date of birth?	A	E	-	To create population groups. There are many active policies that use age as a transversal axis. It is necessary for individual diagnoses.	It allows building up the age at different dates. This enlarges the treatment possibilities.
Ec	Indicate your class of age:	CNC	E	8	Compare it with the age intervals established in the Municipal Census and other general statistics. It is a key variable to contextualize the situations of individuals and groups.	Regrouping allowed. It is a cross variable, necessary for group and individual diagnosis.
Nt	Which is your nationality?	CNC	U	3	To create population groups. It is necessary for individual diagnoses.	It is a gap question. Regrouping allowed.
	If you are a foreigner: Do you accept to indicate the country of your nationality?	CND	E	2	To separate the individuals that will respond to the following question.	It is a gap question. S.O. Nt=foreign
Nc	If you accept, What is the country of your nationality?	CNC	U	Table	To know the user's nationality/-ies.	S.O. NtNo=1 Regrouping allowed.
Wl	What is your current way of life?	CNC	E	3	To know the composition and relationship of the persons living in the household.	Regrouping is not necessary.
Mc	Do you have minor children?	CND	E	2		Regrouping is not necessary.
Dp	Do you have other dependent people?	CND	E	2		Regrouping is not necessary.
Th	What is your type of household?	CNC	E	3	To allow possible interventions or resources if necessary. To diagnose the individual's way of life and the kind of house they live in.	Regrouping is not necessary.
Sl	What is your present studies level?	CNC	E	8	To know the user's academic education and establish users group according to the criterion to adapt specific training programmes.	Regrouping allowed.
Cs	Do you possess communication skill in the language of the residence community?	CND	E	2	Key variable for diagnoses relative to the user's personal autonomy. Mainly if they are foreigners.	Regrouping not allowed.
Ls	What is your principal current situation?	CNC	E	8	Labour diagnosis, both individual and by groups.	Regrouping allowed.
Is	Which is your main income	CNC	E	10	To know the origin of their incomes. This allows	Regrouping allowed.

	source?				a potential intervention and a better knowledge of the user's family economy. At the same time, to find out whether they receive any official benefit.	
Ch	What is your mode of the current housing?	CNC	E	9	It has a double function for diagnosis: - To know the degree and manner in which a basic need is met. - The housing tenancy status is a very good indicator of integration in the socioeconomic circuit.	Regrouping allowed but usually inadvisable.
Hs	How is your health in general?	CNC	E	5	To know the user's potential health status, preventing potential illnesses. To intervene with the user in their treatment and monitoring.	Regrouping not advisable. Except for organizations specialized in health issues, this information is relevant mainly for individual diagnoses and monitoring. For groups of population, the health status is an interesting indicator of frailty and/or exclusion.
Hp	For the past 6 months or more have you been limited in your activities because of a health problem?	CNC	E	3		
Sc	What type of Social Security cover do you have as a holder or a recipient?	CNC	U	5	This information is basic of the individual diagnosis and monitoring. It is about the degree and manner in which needs are met.	In general, regrouping is not advisable. Usually, those who have private insurance also receive public coverage, so two answers can be found in these cases. In general, it is advisable to make the analysis taking this circumstance into account.

<b>PERSONAL DATA AND FAMILY UNIT</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Ms	What is your actual marital status?	CNC	E	4	To know the marital status in order to establish divisions and surveys.	Regrouping not advisable.
Ph	What is your current position within the household?	CNC	E	5	Useful for the individual and family diagnosis.	In general, regrouping is not advisable. It is very useful to group individuals by the categories gathered in this variable.
Hc	Are you moved from your usual home country?	CND	E	2	It is a gap question: it classifies individuals.	Regrouping not allowed.
Tw	If you moved from your usual home country, is it?	CNC	E	3	Modalities refer to the estimated time of permanence in the country: temporal, permanent or indeterminate.	S.O. if HcNo=1
Sw	Have you followed studies during the four latest weeks?	CND	E	2	Regarding the work with other users, it allows us to know the user's academic education to adapt specific training programmes, and to validate studies. It is a key feature for population diagnoses.	Regrouping not allowed. It is a gap question: it classifies individuals.
Ts	If you followed studies, What is your field of studies?	CNC	E	8		S.O. if PSNo=1
Mh	How many members, including you, reside within the household?	CNC	E	4	To know the composition of the family unit.	Regrouping allowed. Usually not necessary.
Dm	Do you have dependent minors in your household?	CND	E	2	To detect family needs and frailties.	Regrouping not allowed. It is a gap question: it classifies individuals.
Hd	If you have dependent minors in your household: How many?	CNC	E	4		S.O. if DmNo=1
De	Which are their ages?	CNC	U	5		S.O. if DmNo=1
Mo	Do you have dependent minors out of your household?	CND	E	2		Regrouping not allowed. It is a gap question: it classifies individuals.
Hm	If you have dependent minors out of your household: How many?	CNC	E	3		S.O. if MoNo=1
Me	Which are their ages?	CNC	U	5		S.O. if MoNo=1
Od	Are there other dependent people in your household?	CND	E	2		Regrouping not allowed. It is a gap question: it classifies individuals.
Oe	If yes, what are their ages (one answer by class)?	CNC	U	4	S.O. if OdNo=1	

Sh	What is the structure of your household?	CNC	E	8	To know the composition of the family unit.	Regrouping allowed.
Ih	What are the monthly incomes of your household?	CNC	E	Table	To know the family economic status and relate it with a specific group of population.	As an open question, it allows adapting the data to any kind of analysis. It also allows drawing averages, calculating income dispersion measures, tabulating according to the objective of each analysis and making comparisons by specific tabulations and/or regrouping modalities. International references differ considerably from one country to another.
Ki	What kind of incomes do have household?	CNC	M	4	To know the stability of family income.	Regrouping usually not advisable.
Si	What are the income sources of the household?	CNC	M	10		

<b>DATA ON THE HOUSING</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Tl	In what type of lodging do you presently live?	CNC	E	7	For the individualized action, to enable possible interventions or resources if necessary. To diagnose the user's way of life and the typology of the house they live in.	Regrouping not advisable.
Hc	Do you consider that the habitability conditions of your type of lodging are acceptable?	CND	E	2	To know the problems associated with the habitat.	Regrouping not allowed.
Dh	Are difficulties associated to the housing (several responses available)?	CNC	U	11	Individual and territorial diagnosis.	Regrouping allowed.
Da	Do you have difficulties of access or maintenance of your present housing	CNC	U	5	Individual diagnosis. To detect large frailty and/or exclusion situations. To guide individual intervention as regards housing.	Regrouping not advisable.
Nr	Number of rooms of your housing.	CNC	E	5	To know the suitability of the housing to the family characteristics.	Regrouping not advisable.
Ta	In an approximate way, which is the total area of your housing?	CNC	E	6		Recommendation: use this information in combination with data related to family composition.
Ch	Did you change housing during the latest year?	CND	E	2		Regrouping not allowed.
Cc	Did you change your commune residence during the latest year?	CND	E	2		Regrouping not allowed.

<b>HEALTH CONTEXT</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Df	In the daily life, do you have any difficulty to feed yourself	CNC	E	3	The aim is to detect health problems, which are chronic or limiting for the development of the individual capacities in the different fields of their private, social or working life. They are key questions in individual diagnoses.	Regrouping not advisable.
Db	In the daily life, do you have any difficulty to get up and go to bed	CNC	E	3		Regrouping not advisable.
Du	In the daily life, do you have any difficulty to get dressed and get undressed	CNC	E	3		Regrouping not advisable.
Ds	In the daily life, do you have any difficulty to have a bath or a shower	CNC	E	3		Regrouping not advisable.
Cd	Do you have any long-standing illness or health problem?	CND	E	2		Regrouping not advisable.
Hr	Do you suffer from a handicap that is medically recognized?	CND	E	2	It discriminates individuals with medically recognized disabilities.	It is a gap question: it classifies individuals.
Hk	If yes: What kind of handicap	CND	U	3	To know the kind of disability. For individual diagnoses. It is interesting for the analysis of groups of individuals for specialized organizations.	S.O. HrNo=1 Regrouping not advisable.
Hp	If you suffer from a physical handicap, what is the percentage?	CNC	E	4	The recognized percentage of disability will depend on the individualized action of the organization and the chances of inclusion in public assistance programmes.	S.O. Hk01=0 Regrouping not advisable.
	If you suffer from a physic handicap, what is the percentage?	CNC	E	4		S.O. Hk02=0 Regrouping not advisable.
	If you suffer from a sensory handicap, what is the percentage?	CNC	E	4		S.O. Hk03=0 Regrouping not advisable.
Aw	Approximately, what is your weight (in kilos)?	A	-	-	The ratio height/weight (BMI) is a health indicator, which reveals obesity cases. There is also a relationship between this indicator and the socio-economic level.	We can determine the BMI (Body Mass Index). BMI = weight (Kg)/height <sup>2</sup> (m). The BMI allows classification according to the nutritional status of each adult.
Hc	Approximately, what is your height (in centimeters)?	A	-	-		
Lq	How would you rate your life quality?	CNC	E	6	To know the individual's perception about their general health status.	Regrouping allowed.

Sm	Do you smoke?	CNC	E	5	<p>The different addictions are general problems, some more than others.                  In all cases, prevention is recommended.                  These questions help evidence the existence of problems linked to addictive substance consumption. They are usually responded reluctantly, so that the results are often sub-estimations.                  They are general questions on stability in eating habits.</p>	Regrouping allowed.
	Have you consumed alcohol in the last 4 weeks?	CND	E	2		Regrouping not allowed.
Ca	Have you consumed alcohol in the last 12 months?	CND	E	2		Regrouping not allowed.
	Have you consumed cannabis in the last 30 years?	CND	E	2		Regrouping not allowed.
Cc	Have you consumed cannabis in the past 12 months?	CND	E	2		Regrouping not allowed.
Sd	Do you follow or have you followed a special diet?	CND	E	2		Regrouping not allowed.
Fp	During the last three years, did you change your food practices so as to loose weight?	CND	E	2		Regrouping not allowed.

<b>AUTONOMY</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
DI	Do you have a driving license (valid in the residence country)?	CND	E	2	It is important to relate mobility questions with autonomy and job search.	Regrouping not allowed.
Pc	Do you have a personal car?	CND	E	2		Regrouping not allowed.
Pm	Do you have a personal motorcycle?	CND	E	2		Regrouping not allowed.
Pt	Do you usually use the public transports to move?	CND	E	2		Regrouping not allowed.
Tr	If no, what is the reason?	CNC	U	4		S.O. PtYs=1 Regrouping allowed.
SI	Can you speak the language of your residence country or community?	CNC	U	3	To point out whether the user has any problem with the language of their country of residence.	Regrouping not advisable.
WI	Can you write the language of your residence country or community?	CNC	U	3	It is a basic question in diagnoses for specialized organizations in actions addressed to immigrant population.	Regrouping not advisable.
RI	Can you read the language of your residence country or community?	CNC	U	3		Regrouping not advisable.
As	Do you belong to any association in the place where you usually live?	CNC	U	7		The membership in associations in the place of residence is a good indicator of integration. It is also useful to detect whether the user has support networks.
Uc	Have you used a computer in the last month?	CNC	E	3	The digital gap is currently an additional factor of exclusion. This question aims to capture the position of the user as regards the use of digital technologies.	Regrouping not advisable.
Ui	Have you used the Internet in the last month?	CNC	E	3		Regrouping not advisable.

<b>EMPLOYMENT</b>						
<b>Cod.</b>	<b>Descriptor</b>	<b>Q</b>	<b>R</b>	<b>Categories</b>	<b>Reason</b>	<b>Observations/Recommendations</b>
Lw	During last week (from Monday to Sunday), did you do any work for pay or profit even for as little as one hour if it went sporadic or occasional form? Pay includes payments or “payment in kind” (payment in goods or services rather than money). It can be done for someone else (salaried worker), or as a corporate manager or a self-employed worker or unpaid family worker.	CND	E	2	This is a selection question. The aim is to detect the individual’s position as regards their labour status following the standards established by the ILO.	Regrouping not allowed. The relevant answer is LwYs: it indicates that the individual is “employed”. The answer LwNo does not allow obtaining a relevant conclusion on the individual’s labour status. For this purpose, it is necessary to keep advancing in the completion of the file.
Hp	Although you did not work last week, Did you have a job but you did not go to for any reason as holiday, illness, studies, maternity or paternity permission, working conflict, etc.?	CND	E	2	This is a selection question. The aim is to detect the individual’s position as regards their labour status following the standards established by the ILO. For group diagnosis, with this question and the previous one we select the “employed” individuals”.	S.O. LwYs=1 Regrouping not allowed. The “employed” individuals are the ones that choose LwYs=1 + HpYs=1. Of the rest of them, we still cannot conclude anything about their labour status.
Po	If you worked last week or if you have a job you did no go for a previous reason: For what person or organism did you work?	CNC	U	6	This question is only asked to the employed in order to know the kind of employer they have.	S.O. LwNo=1+ HpNo=1. Regrouping allowed.
Ec	Do you have an employment contract (even a verbal one)?	CND	E	2	To know the kind of labour relationship.	S.O. LwNo=1+ HpNo=1. Regrouping allowed.
Pj	How is your present job?	CNC	E	2	To detect job instability. The effects of job instability on the individual’s life project are very important.	S.O. LwNo=1+ HpNo=1. Regrouping allowed.
Hh	How many times do you work by week?	CNC	E	4	To detect part-time employment.	S.O. LwNo=1+ HpNo=1. Regrouping allowed.
Cw	How would you qualify your present job conditions?	CNC	E	5	To obtain information on the individual’s perception about their labour conditions. It is a good indicator of the job quality.	S.O. LwNo=1+ HpNo=1. Regrouping allowed.
Ds	Are you actively seeking another job?	CND	E	2	To detect the existence of job search among the individuals that already have a job but intend to improve their labour status.	S.O. LwNo=1+ HpNo=1. Regrouping not allowed. The crossing of this variable with

						the previous one provides valuable information about the user's attitude with regard to their labour project.
Sw	If you did not work last week (and did not have job to go): Did you actively seeking work as paid employment or self-employment, or did you find a job to start later?	CND	E	2	This is a selection question. The aim is to detect the individual's position as regards their labour status following the standards established by the ILO. This question, along with the previous one, helps us select some "inactive" individuals for the group diagnosis.	S.O. LwYs=1+ HpYs=1 Regrouping not allowed. The individuals that choose response SwNo are "inactive". The response SwYs does not allow obtaining a relevant conclusion about the individual's labour status. For this purpose, it is necessary to keep advancing in the completion of the file.
Ua	Did you find an appropriate job, or have an opportunity to get one, would you be currently available to work in it before the end of the two weeks following?	CND	E	2	This is a selection question. With this question and the two previous ones we select the "inactive" and the "unemployed" individuals.	S.O. LwYs=1+ HpYs=1 Regrouping not allowed. The individuals that choose response UaNo=1 are "inactive". The ones choosing Sw=1+UaYs=1 are "unemployed".
Up	Did you previously do a job, either as paid employment or self-employment or as an unpaid family worker?	CNC	E	4	To know whether the unemployed have work experience and the duration of their unemployment.	S.O. LwYs=1+ HpYs=1 Regrouping allowed.
Ub	In which situation were you before your search for a job?	CNC	E	9	To analyze the kind of transition experienced by the unemployed: whether they have ended in unemployment from inactivity or from employment.	S.O. LwYs=1+ HpYs=1 Regrouping allowed.
Pt	Presently, do you make employment training?	CND	E	2	To know whether the individual is at present receiving training for employment. This is necessary for designing the individual inclusion itinerary.	Regrouping not allowed.
Te	If you make employment training, indicate the field:	CNC	E	8	To obtain information on the field of training. Given the way it is posed, this question is more useful for group diagnoses than for individual ones.	S.O. PtNo=1.
Ly	At the same period, in which situation were you last year?	CNC	E	9	To compare the individual's labour status with the previous year. To study job	Regrouping allowed.

					transitions.	
Uj	What is the type of your present or latest (in case of unemployment) job?	CNC	E	Table	To broadly analyze the job.	Regrouping allowed.
Ea	What is the economical activity of your present or latest (in case of unemployment) job?	CNC	E	Table		Regrouping allowed.

## ***6. IMPLEMENTATION OF THE CATALYSE METHOD WITHIN THE TERRITORIAL PROJECTS***

The CATALYSE territorial intelligence tools. These tools do their best to respect the principles of sustainable development as a development that "*meets the needs of the present generation without compromising the ability of future generations to meet their needs*" (BRUNDTLAND, 1987). The knowledge of the people's needs is prevailing in the CATALYSE diagnosis. The comparison with the supplied services to satisfy them, as well as the territorial indicators, in a fundamental aspect of the evaluation.

The uses of the CATALYSE method do not only concern the technical use of the data processing tool, but also the understanding of the contents and the method. It is not so usual in the public sector, and even in the associative sector, to clearly start from the needs in preference of the actor's skills and to evaluate the efficiency and the relevance of the services.

The uses also concern the organization of the CATALYSE method and tools implementation in partnership, i.e. in a non-hierarchical organization. How to design and define multisector tools? How to create a common language between sectors and actors? How to distribute the data collection and manage the gathering of data? How to animate the data analysis in a participative way? How to inform partners and inhabitants? What is the impact of observation on the partnership and on the community? All these questions, and others, are interested in the uses of CATALYSE method.

So the topic of the uses is a far-reaching comparative research activity. In this domain, everybody thinks he has special problems to solve, with different mechanisms in a very specific territory. In such context, multisector partnership is difficult to build and maintain. But, if it is true each person has individual problems, it is also true that the persons have the same global problems, even if it is in a specific way and/or in a specific local context. That is why we have to "think globally and act locally". So this topic concerns the common uses, the general advantages and the difficulties that everyone, and especially new users, can come across during the implementation and use of CATALYSE in a multisector local partnership in order to put its actions in a sustainable development logic.

The wp6g tried to start from the experiences of partnership observatories using CATALYSE method to specify recommendations for new users of CATALYSE. Every one is confident that uses are a crucial topic. The observatories OLE, VALDOCCO, ACCEM,

OPTIMA, INTEGRA, worked out the following results ADAPEI with the coordination of Maria Jose ASENSIO COTO of the University of HUELVA, and the help of the CAENTI academics. These coordinations also use regional steps: in Walloon region with OPTIMA, INTEGRA and the University of LIEGE, in Spain with ACCEM observatories, VALDOCCO, OLE and the University of HUELVA and in France with ADAPEI, COCAGNE and University of Franche-Comté.

This chapter presents:

- First recommendations about the information source;
- The examples of five observatories;
- The experiences of three observation mechanisms.

OPTIMA and INTEGRA began a joint comparative history to establish a first list of recommendations as a “work piece to be broken”, that will make the subject of a further report after discussion. The experimentation of the diagnosis using the “migrants”, data collection in 2006 and data analysis in 2007, will give interesting elements concerning various aspects of the CATALYSE method and tools uses.

### ***6.1. The source of information***

To determine the data collection unit, the key issue is the source. The chances of success of the single document system depend on the appropriate choice of a single source of information. In the case of entities whose activity focuses on intervention with individuals, all the relevant information to elaborate individual diagnoses, itinerary evaluation and monitoring refer to the individual. Data on identification, employment and health status, education, family status, characteristics of the neighborhood where they live, most relevant needs, services received from the entity, etc... refer to the individual, who is the bearer of this information. In the same way, all the information regarding the activity of the entity can be obtained from the aggregation of individual information: users' characteristics, needs met by the entity, services provided, volume of activity, target territory, etc; all this information

refers to the group of individuals seen by the entity, and the source is, once again, the individual.

Whether interventions are approached from the point of view of the rights or whether they are approached from the point of view of the needs, the key notion is the individual's project. As a result, this is the basic referent when conducting any kind of evaluation.

Once the source has been determined, we can establish who collects each piece of information and when. Two possibilities can be considered: On the one hand, creating a specialized service for the implementation of this task, so that the information is away from the source: the individual. This is an intermediary activity. The other possibility is to collect the information within the unit that generates or knows it.

The second option is the most appropriate for actions aimed to act on individuals. It is the professional, directly working with the individual, who knows the importance of each piece of information and the truthfulness of the data obtained. The entity's knowledge about the user's needs is obtained through the professional. The same happens with the specific actions or services provided to the users, the responses derived from these actions, the dynamics generated and the context where they are developed. In addition, the professionals are themselves the main target of the information system and, therefore, it must be them who should decide on the contents to be collected.

Therefore, it is the professional implementing the action that performs this task, and the system must allow them to do it, to the extent possible, in real time.

In general terms, the Harmonized Observation Guide is just a list of standardized questions similarly formulated for all users. The design of this document determines the development of all subsequent works, so that the guide is the basis for all the data collection system, articulated around it, for the bureaucratic and administrative monitoring of all the entity's activity.

In addition, the data analysis provided by the completion of this document is at the same time an output of its design and the input for its re-elaboration, because the guide must evolve along with the entity that is using it.

As a result, the preparation of a document satisfying all the needs mentioned above is an extremely hard task, which is implemented in various stages:

- Definition of objectives.

- Survey of the entity's activity.
- Definition of the dossier structure as a single document.
- Testing, last modifications and final dossier.

The definition of objectives is the result of a joint reflexive work with the persons in charge of the different programmes implementing the entity's actions.

The implementation of the following stages requires the detailed analysis of the different documents for data collection used by the entity: activity reports, different forms used for collecting information on the users of the different programmes, user summary forms, admission application forms, report to be completed during the first interview with the users, etc.

The definition of the guide structure requires special attention, as it is this document's structure what will determine on the long term the adaptation of both the data collected and the software that will be designed based on the document. As a result, it must meet the requirements mentioned above for the whole of the project.

Depending on the needed data, obtained from the analysis of both the association's structure and the users' general characteristics, and following the structure designed for this document, the next stage is the preparation of the experimental guide, which will serve as the basis for starting the design and programming works.

After verification and control of the first round of data that the guide must contain, a first document (draft guide) is drawn. This will harmonize this set of data with the needs of the analysis and statistical exploitation of the data, as well as with the options of the software design.

The work on this draft will serve as the basis for subsequent joint reflection whose result will be the design of the structure of the final guide.

Each of the seven sections of the guide is made up of different kinds of questions according to the choices of response (open and closed) and collects different kinds of data (numerical, reasoning, ordinal, textual, etc...).

The closed precodified or fixed response questions are those whose responses are already delimited during the guide design stage. This results in a larger demand of rigor and thoroughness when formulating this kind of questions with respect to open questions. At this point, documentation prior to the writing of the question on the different alternative responses

is especially important. Similarly, the different options of response shall comply with the requirements of thoroughness, precision and exclusion. In the cases where there is a possibility of other options of response apart from the ones listed, the option “others” shall be included.

As a general criterion, the largest possible number of closed questions has been included. For that purpose, in some cases it was necessary to add an annexed table with codified possible answers. The choice of this general criterion is due to the big advantages provided by the standardization of data collection that closed questions allow: speed and convenience in registering information; possibility of focusing the responses on those options considered relevant and related to the question asked; immediacy in recording the responses into the computer once they have been collected in paper; greater comparison of responses as they are stated in the same terms; elimination of potential ambiguities of the responses.

Nevertheless, as stated above, closed questions require greater dedication at the moment of elaboration and restrict the options of response.

As regards the questionnaire format, we have followed the usual recommendations as far as possible:

- Using book format: To make the reading of the questionnaire easier, to prevent pages from being lost, and to make completion easier.
- Spacing out questions: The arrangement of the questions with little space in between can make its completion more difficult and lead to errors.
- In open questions, provide enough space for responses to be written down: the space given is usually interpreted as an indicator of the kind of answer required.
- Numbering the questions.
- Avoiding questions to be split in two pages.
- Avoiding a long question to be followed by a short one at the end of the page. This may lead to missing out the last question.
- Arranging the responses vertically.
- Preparing the questionnaire for data processing: This preparation implies the pre-codification of the questions.

It is convenient to reserve some space for observations in each section of the guide. This allows completing aspects that have not been considered previously, but are related to the content of that section. Doing so, the possibility of recording exceptional situations or individual notes is left open. The guide is completed with a series of control data that appear on its heading.

Once the codification is finished, the resulting document is ready to undergo a first test of use that will allow us to finish the dossier or experimental guide design process.

The objective of this first test is to check the appropriateness of the questions regarding their formulation, thoroughness regarding the entity's needs, categorization of the responses, arrangement throughout the guide, and the guide's format.

- We therefore check the suitability of the way in which questions are posed as regards easiness of understanding and clarity, avoiding confusions that can distort the collected data. At this point, it is important to ensure that the language used matches that of the users. In any case, the writing of an interpreting guide is useful to avoid potential problems in this sense.

- The form must be exhaustive regarding the entity's daily work, since it must be able to collect all contingencies that come up, as it is considered a single document. At this point, the proper categorization of the responses to the closed questions plays a key role.

- Similarly, the test must confirm the arrangement of the questions throughout the document, their logical sequence and duration. This is because the established order and the structure of the questionnaire itself must match the daily activity of the questionnaire users, so that it does not imply additional work for them.

It is important this experimental stage is shared with the entity's staff, considering the completion of the guide by all the entity's staff that will later use it. It is at this stage where they are completely involved in the project. So, this first test also allows the users to detect and inform the work teams of their own training needs for the correct use of the guide.

## ***6.2. Examples of observatories in CAENTI***

### **6.2.1. ACCEM (Spain)**

ACCEM is a nationwide non-governmental organization, which develops its services and programmes in the field of migrations since 1992. The entity is present in ten Autonomous Communities in Spain (in twenty one provinces and twenty six municipalities).

The main programmes implemented by ACCEM are:

- Temporary reception to refugees and immigrants (Reception Centres).
- Social and integration and Labour insertion.
- Social and educational training (language training, knowledge of the environment and setting, social abilities, etc...).
- Awareness rising.
- Investigation and Community Development (Development and management of Observatories).
- Community Initiatives on Employment and Development of Human Resources.

Out of ACCEM's experience in social and labour inclusion programmes with immigrants, it has been verified that this group faces a vital situation of personal dispersion: cultural, family, social and labour disintegration caused by the disappearance of the social and cultural framework of reference.

To carefully approach and to reach a better theoretical and human understanding of this situation, we can distinguish four phases that are experienced, as described below:

1.- Both social and economic idealization of the host country as opposed to the country of origin and of the achievement of their improvement plans in an easy, flexible and relatively fast way in the host country.

2.- Break-up of expectations of the migration project in the process of arrival to the receiving society.

3.- Internal conflict within the receiving society caused by cultural clashes and by the need of adaptation to it.

4.- Gradual process to reconstruct the cultural, family, social, labour, material and economic setting in the receiving society.

On the other hand, from a statistical approach of the context of migration in our country, a number close to four million foreigners is estimated; approximately 30% has a European origin. The rate of foreign resident population, around 8.4%, is still one of the lowest in Europe. As it already happened in all western countries, if we maintain our high rate of economic growth, the increase in immigration rate will continue. And this tendency responds to a law contrasted by historical experience: economic growth and development lead to an increase in the population coming from third countries.

To maintain economic growth in Spain it is essential to appeal to immigrants. Tendencies show that the increase in immigrant population is directly proportional to our economic growth and to the differential income as compared to our neighbor countries. It cannot be known how these variables will behave in the future, but the National Institute of Statistics (INE) has presented its own estimations: entries foreseen in 2002, 227,000 immigrants; 204,000 in 2003; 181,000 in 2004, and 160,000 in 2005.

*All these realities bring up the challenge of establishing and structuring social reception and integration policies in our country, a challenge which will be increasingly assumed from the territorial and local approach of the immigration phenomenon, identifying the problems and needs, and proposing, in turn, policies and actions aimed at generating intercultural cohesion and co-existence processes among the receiving and migrant populations.*

As a result, in order to develop performances that may respond to the reality that this population is facing, diagnosis processes and means of fluent and coordinated data collection from various sources (Social Services, Health centers, entities, public and private institutions, NGOs, NPOs, etc.) must be established. This will allow the design of interventions in each territory, based coherently on the needs and demands detected through the information provided by the vulnerable population itself.

The choice of the guide's contents has implied intense work of reflection on the entity's needs and the system's objectives, and also on the nature of the performance and the different services provided by the entity. It has also been necessary to make a conceptualization effort on the multi-dimensionality of the reality on which stress is aimed. The most relevant difficulties of this work stem from the complexity of certain personal situations, which make it difficult to know which elements we need for their identification. In addition, it is necessary to carefully review the concepts used, in order to have a common

reference for all the social operators, and to avoid subjectivity –which cannot be missed– becoming randomness, which is inadvisable. Moreover, we have considered necessary to maintain at all times the social, economic and territorial dimension, as well as the new concepts contributed by the various sciences that come together in our objective (Economics, Social Sciences, Psychology, Educational Sciences).

### **6.2.2. Adapei (France)**

The Adapei of Besançon is an association of parents and friends of handicapped people that works to defend and promote the children adolescents and adults in order to favor their bloom.

The association is represented by:

- Almost 250 subscribers, families and friends of mentally handicapped people.
- About 1.000 handicapped people.
- 500 professionals within 19 structures that are divided into 5 sectors: childhood, protected work, housing and accompaniment structures, reception for life, services in ordinary environment, general direction.

It gives itself any means to:

- Answer the solidarity obligation of the handicapped people.
- Claiming their equal rights and opportunities.
- Favoring their active participation to the social life and to citizenship.
- Forbidding any kind of discrimination.
- Allowing the right to the compensation of the handicap consequences by specific devices and access to the common law.
- Guaranteeing the free choice of the life project of the handicapped person.

In 1994, the SASP (Social and Professional Accompaniment Service) and the SIP (Professional Insertion Service) of the Adapei of Besançon (association of parents and friends of mentally handicapped people) started an evaluative step of the users' itineraries, which is based on a research work that is led by a social worker in the framework of his formation before the direction team decided to change it into an objective of the service.

The « project » approach participates to the SASP/SIP culture of the Adapei of Besançon since its creation in 1984, and it is in a national context that is evolving from the of the new technologies contribution from of view that this step is developing.

Indeed, from now on the reform of the WWIV appendixes that govern the childhood sector, in which the UNAPEI (National Union of the associations of parents and friends of mentally handicapped people) was strongly involved, lauds the individual project of the

mentally handicapped person as a base of the associations and establishments projects, by introducing the management by project as a base of any care of the young mentally handicapped people by the IME.

From now on, the new technologies are mentioned as possible tools at the service of the individual project execution.

Indeed, they have a place that becomes predominant in all the life aspects and at all ages: being handicapped or not, they became an incontrovertible element of the social and professional inclusion, and we can hardly imagine avoiding it in an adapted care.

Moreover, the generalization of the fields that are concerned by the NICT, added to an increasing use easiness, make it an additional asset at the service of the project step and at each step of its execution:

- Upstream of the care (administrative follow-up, management and anticipation of the population evolutions).
- In the implementation and the follow-up of the individual project (computerized management of the care steps, of the user's advancements...).
- By the offered tools to execute the project itself (education devices, preparation to the social life...).

Firstly, the NICT introduction in the establishments daily practices obliges to wonder again about the choice of tools that are adapted to the users, and consequently to refocus the care on the person by giving him/her a new role in the decision-making of his/her own life choices.

The NICT also change the articulation between the care various axes, as well as the relationships between the actors: between professionals, between professionals and exterior actors and between the professionals and families.

Lastly, the NICT conversion means the establishment that chooses to it makes a step that is oriented towards innovation, even if at that time there are hazards and if the results do no always correspond to the expectancies and to the made efforts.

The SASP and the SIP objective in 1994 is directed towards the NICT as:

- Tool of an evaluative step of the users' social inclusion that is based on the observation of the user/service interaction as an indicator of the users' inclusion evolution.

This step is based on the idea there is a strong and complex relation between the actions which were implemented towards the user and its inclusion quality, the more so as the user's demand has a situation that is set in the centre of the action and that organizes the social work.

- Databases that allow improving the observation of the evolution of the social action that is made by the service's users, to analysis the practice. It includes administrative information on the user, but also intervention fields, modes, places and durations of the interventions that are made by the social workers.

- Means to present the results that were obtained by the service to the association and to the financial authorities.

Since 1994, the NICT use allows the SASP, by way of experiment, making a first annual accompaniment balance for each user, which emphasizes: the interventions number and duration, their division according to the mode, the places, the fields; the interventions rhymes and variations...

#### **6.2.2.1. Partnership**

It is in 1997, under cover of a European funding in the framework of the "Horizon Adapt-Emploi" that the work will be able to continue in a more detailed way, with the association agreement and the active participation of all the SASP social workers team.

A partnership between the SASP / SIP of the Adapei of Besançon, the association IODES and the MTI@SHS center was created, it brings to the Adapei of Besançon a double knowledge of the social sector and of the data-processing tools.

Indeed, since 1990, the Center MTI@SHS directed its research activities towards the problematic of permanent and territorialized observation and for some years has offered an original model of socio-economic observatory that allows inscribing the actions in a coherent logic of local development that is funded on the partnership of economic and social actors that are organized in network on a territory.

The CATALYSE method especially includes tools of constitution and analysis of socio-economic descriptors and indicators to follow-up professional inclusion trajectories.

The objectives of the partnership that is created by the project planner of the SASP/SIP are:

- Creating software of auto-evaluation on the base of a standard evaluation questionnaire and its accompaniment notes that also corresponds to the gathering, data

treatment and statistic follow-up tools of the RMI that is implemented by the Ministry of Social Affairs, Health and Town.

- Setting it up, experimenting it, training the users (explanation of the descriptors, accompaniment to fill it in) and the functioning follow-up.

- Drafting a first statistical balance (data flat sorting) and accompanying the analysis, the results interpretation and synthesis with the operator's participation.

Eventually, the designed tool should allow improving the follow-up of the itinerary of the users, who are received and accompanied, but also valuating their itinerary and the social workers activity.

Intended to all the persons who intervene that make accompaniments and who want to facilitate their actions evaluation, it will favor:

- The gathering of the information about the initial situation and the cared users', persons or families, difficulties.

- The prominence of those that were made during the care.

- The prominence of the user's final situation.

The data analysis will then allow the stakeholders team who lead an action, to carry out a periodical evaluation of their project comparing the aims and implementations in order to improve their action strategy.

The information about many actions forming a plan could be gathered to be analyzed by the team who lead the plan or by an external expert. The action stakeholders can be associated with this analysis as part of an evaluative assessment process.

The results of the document use could provide an observation post of the social action.

The aim consists also in the development of a tool which could make for a best shared knowledge of the users condition between both SASP and SIP by means of a global and distinctive accompaniment: PARADA.

Thanks to a new European funding within the « Equal » framework consisting in the struggle against discriminations on the labor market, the Adapei of Besançon has been able, since 2002, to adapt and carry on its research about a data-processing tool, which consists in both collecting data about a user and remarking the development of his / her condition and the consequences about the institutional activity.

It is a partnership made up of 7 members, all social actors in relation to handicapped persons or in important social difficulties, located in the whole Franche-Comté Area, which still devises with the MTI@SHS Center and the methodological support of the IRDESS office, then tests out, and finally uses a database and a tool of collective assessment on the web (intranet site [www.exigence.org](http://www.exigence.org)), during 3 years.

It is within a regional framework especially marked by an industrial regression and increasing socioprofessional difficulties for marginalized persons because of, for instance, their mental disability, that the project of the Equal « Exigence » partnership aims to try out a cooperation within concerted actions about employment access of persons in important difficulties.

To meet Europe's requirements, innovative technical solutions, also transferable, being part of a partnership and calling upon the NTIC, will be developed regarding concerned people.

In this way, it allows these waiting people to move distinctively on their integration path and improve their initial condition, thanks to a work about the quality of the interventions and their complementarity.

The partnership does not only aim to give quantitative explanations about registered employment access, but also, to give qualitative explanations in order to improve integration conditions of persons with the most important difficulties on the long run.

For this, the project must also have impacts on the development of reception facilities and people accompaniment system, thanks especially to their access to assessment methodologies of work and results produced by the NTIC's availability.

It is expected that the works conclusion lead to the development of an observation post from individual paths, which have been registered by each partner, and experience feedbacks, by measuring then improving the practice and integration processes.

Some new contributions to the assessment and self-sufficiency development of persons in difficulties system should be done: indicators, instrument panels, measuring tools, all these basics should apply to every class of population with socioprofessional integration difficulties.

« Leading an assessment approach – and not submit either to an assessment – that means first to think about the project, to wonder how we are a manager of social transformation ».

#### **6.2.2.2. OSUA**

Within this new phase of work, which has started since July 2005 the importance of the information management rationalization about the beneficiaries is emphasized to give the best answers to their expectations.

As the previous points show, the Adapei of Besançon put a lot into a concerted data processing about the followed users, for a long time.

It managed European projects, which followed the directions of the strategic observation and the assessment of the users paths.

According to the law 2002-2<sup>1</sup>, it has started a rationalization of its internal processes, formalized in its qualitative approach. It obtained for this approach an ISO 9001:2000 authentication in December, 2005.

We note the importance of the users right to access to every kind of information or documents about their care since the law « data processing and liberties » dated from the first of January, 1978, strengthened by the law 2002-2 for the medico-social sector.

Thus, the following questions gain in importance about the application of an information system in relation to the users follow-up: how formalize an information, what is an useful information, how share it and respect at the same time the users private life, what system could be used inside and outside, what kind of filing could be chosen... These questions are often raised on the occasion of the implementation of the assessment approach, that is a privileged time to wonder about practices and formalize them. From now on, the point is to introduce an overall traceability. Filling in a file should not be an imposed measure, but the opportunity to remind the action signification and wonder about the care development.

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<sup>1</sup> The law 2002-2 dated from the 2nd of January, 2002 is a reform of the social law dated from 1975. It renews the social and medico-social action. It reasserts the users rights and obliges the institutions of reception to introduce some tools in order to materialise them.

It concerns the creation of a charter about rights and liberties of the received person, the self-assessment and external assessment about activities and services quality, a social planning in accordance with a departemental system, the users placement in the care plan (distinctive project, right to an adapted information, reception booklet, operation rule, information and files access, residence contracts, social life recommendation, settlement projects, unified networks,...).

This law is specified by the “handicap law” 2005-102 dated from Februar, 2005 and effective from the first of January, 2006.

The written work is fully integrated with the assignment of the social workers, and that is why, it is advisable to give them means and time to improve their work of accompaniment. Thereof, the file is just the written proof of the actions led by and for the user.

The information system should not automatically tolerate the edition of an individual project, but it contributes to ensure the person's rights.

The norm ISO 9001: 2000 specifies the demands about the system of quality management when an organism:

- Has to show its capability to supply regularly a product (or a service) complying with customer's demands (users, beneficiaries) and applicable regulation demands.

- Aims to increase the customers' satisfaction (users, beneficiaries) thanks to the effective use of the system including the processes of continuous improvement system and the assurance of customers' demands conformity and applicable regulation demands.

All the demands in accordance with this convention are generic and enforceable to every organism, whatever its type, importance and the final product.

The specified demands about the quality management system ARE ABOUT THE ASSURANCE OF THE PRODUCT QUALITY (OR THE SERVICE QUALITY), but also aim to INCREASE THE CUSTOMERS SATISFACTION (AND/OR USERS OR BENEFICIARIES).

This convention promotes the adoption of a PROCESS APPROACH during the development, the implementation and the IMPROVEMENT of the quality management system efficiency, in order to increase the customers' satisfaction (and/or users or beneficiaries) by the respect of their demands.

In order that an organism efficiently works, it has to identify and manage A LOT OF CORRELATED ACTIVITIES.

Every activity using resources and managed to allow the transformation of input elements into output elements (for example: accompaniment project of a beneficiary from his/her condition at the reception), can be viewed as a process. The output element of a process often constitutes the input element of the following process.

« The process approach » is the implementation of a process system in an organism, as well as the identification, the interactions and the management of these processes.

When it is used within a quality management system, this approach emphasizes the importance of:

- Understanding and satisfying demands.
- Viewing the processes as value added.
- Measuring the processes performance and efficiency.
- Improving continuously processes on the basis of objectives measures.

The showed and acted will of the Adapei of Besançon allowed developing an assessment dynamics of internal needs taking into account many developments imposed by the effective regulation measures coming in majority from the persons who financed it. That is why, the MTI@SHS Center recommends a data processing resolution pre-eminently flexible, able to adapt to the legislative, administrative and social contexts.

The law 2002-2, base of the internal quality approach, as well as the status, are interesting parts to accomplish this project, because they assure at a minimum the necessary assessment processes, then, in the case of the information system, the basic data processing's to define in order to satisfy the institutional demand.

A large vigilance must be continually preserved, internally, in order to follow the main regulation plans developments and to reflect within the system every changing that would become essential.

The Equal phase 3 project about “capitalization and dissemination” comes within this framework and also aims to structure the information and its use in order to improve the beneficiaries' accompaniment. In that way, they observe the difficulties of a handicapped and socially excluded population, which is considered by the Exigence partners.

All in all, the project comes within a specified social and economic framework (pronounced unemployment in France in 2005, and social plans regularly evolve). The various frameworks called to use this common software act in support of beneficiaries in order to improve their daily life conditions.

Target people:

- Children, teens and young adults, aged 0 to 20, mentally handicapped and polyhandicapped.

- Adults directed towards an ordinary work and life background, mentally handicapped affected with a cranial trauma or a sensory disability (deafness, blindness).

- Adults directed towards a protected work and life background, mentally handicapped.

- Adults, mentally handicapped in retirement.

- Adults, mentally handicapped, who are physically autonomous directed towards a foster care.

- Polyhandicapped adults.

It is also agreed that considering the previous experience of partnership, the concerned population also represents persons with important social integration difficulties (“social disability”), and eventually, the developed information system could conform to every kind of population in important difficulties and cared by specific structures or departments.

The Equal phase 2 about « accomplishment » has been qualified by significative results in the field of the employment access for these people, that deserve an evaluation in respect to the phase about capitalization and dissemination:

- Personal accompaniment book for users, shared by the 7 PDD’s partners, using the NTIC, secure and available on the intranet site [www.exigence.org](http://www.exigence.org), accompanied by measures and indicators of assessment (general and thematic instrument panels).

- Modelisation scheme of an integration path with characterization of the main phases and problematics.

- Reference scheme for the accompaniment « employment training » in a process approach concerning the integration path.

- Analysis and experimentation about the objectives of users integration plans and partners actions.

By gathering and diffusing these different contributions and productions:

- Within an online cooperative data system.

- In follow-up forms about the progress of the user condition, from the plan admission to its issue, with the help of assessment indicators and criterion.

- In a report and an online service to assure the users accompaniment, with the help of a clarification of the integration path by a fundamental theory and its special use within the training accompaniment framework.

- In connection with the administrative follow-up imposed by the Laws 2002-2 and 2005-102.

- And in the respect of ISO 9001: 2000 norms, of which the Adapei of Besançon get the authentication in December, 2005 and for which it applies demands about the data system progress.

The Equal project initiated and led by the Adapei of Besançon will make available to all the social actors a comprehensive tool of collective use within the socioprofessional integration.

This one will deal with the following considerations and contents, which appeal to:

- Three ethical principles:

- + Support of the user involvement.
- + Tools of parternarial synergy between the different organisms or evaluations about the socio-economic integration accompaniment.
- + Global approach of the users condition.

- Three types of use:

- + Quantitative and qualitative assessment about the performance of the actions led for the individual conditions (improvement of the beneficiary condition).
- + Quantitative and qualitative self-assessment about the global performance of organisms (improvement of the service providers offer).
- + Definition of the individual profile and needs, orientation and location of the specific function of the training in the employment insertion path as an instance.

We note that the Adapei of Besançon, looked for a partnership to expand the product spreading and its conception method, and also enrich its thoughts, practices and tools.

It has been realized since March 2006, thanks to the CAENTI project. Concerning the development system, the Adapei of Besançon has chosen to call upon a multimedia studio: VT Design is specialized in conception and accomplishment of communications products and multimedia edition:

- Web site creation and strategic marketing online.

- Web applications development.
- Graphics design and multimedia edition.

VT Design will work with the help of the MTI Center's methodological accompaniment on the following points:

- Analysis of the existent.
- Strategic positioning.
- Global conception.
- Graphics design.
- Development.
- Test and implementation.
- Debugging.
- Putting into production.
- Users training.

### **6.2.3. Integraplus (Belgium)**

In the beginning of the nineties, the CPAS (Public Centers of Social Action) of Durby forms a social coordination. This last one is focused on various observations made by some social actors, at the hands of the important users increase, which add up many difficulties : employment loss or bankruptcy, insufficient resources, housing difficulties, social isolation,...

On the basis of these observations, a diagnostics approach is realized and various actions are formed. In 1997, these actions assessed by the quarantine of social actors taking part regularly in the approach, show the need to decompartmentalize social and economic approaches in order to reinforce the social and professional integration of the target publics.

This observation met with the need for actors, to have innovative method and tools in order to evaluate the profile of public and its needs in terms of accompaniment to its socioprofessional integration.

In 1998, the CPAS of Durby, as well as its partner, the CPAS of Hutton, reply to a FSE – PIC Integra Employment invitation to tender, of which the general topic consists in improving the capacity of employment seekers integration on the labor market.

8 actors coming from the social coordination and active in the field of integration formulate the following aims:

- Having a best knowledge of the users profiles: difficulties, needs, skills and assets.
- Offering an accompaniment and fitted and local actions to support the publics access to the training, the employment or the activities development.
- Reinforcing and enlarging the partnership to improve and diversify the existing service offer on the territory.

It is in this way that the partnership with MTI@SHS, get involved in the development of a socio-economic observation post.

The first results of the observations led in 2000, show that the employment seekers difficulties are structured according to two directions: an autonomy loss because of low level studies and training, which get added to housing, social isolation and mobility difficulties... and an economic precariousness because of the age.

In 2001, three workshops are formed (employment, mobility and housing) to suggest actual actions, now collectively financed by both the FSE's Equal programme and the Walloon Area, as well as within the framework of the FOREM-CNE's request for proposal, CPAS-FOREM's convention...

Today, the actions set led on the territory are:

- Reception, information and sensitization.
- Socioprofessional appraisals, skills appraisals and counseling.
- Life project, self-confidence and self-esteem modules.
- Decentralization of (pre-) qualifying trainings (versatile care assistant, lady-help).
- New offers of individual and collective accompaniment (professional guidance, accompaniment for the creation of activities and self-employment, creators Village).
- New training offers: environmentalist worker, soldering, computing, languages...
- Consideration of mobility (busing, theoretical and practical driving license).
- Social estate agency and Permanent Housing Plans.

These actions gather today more than a score of partners. They fit into a transcommunal and multisector-based territorial approach, as well as into a local operational plan, which follow according to a participative approach all kind of publics, with a special attention paid to weakened publics, according to a path logic of distinctive integration.

#### **6.2.4. Optim@ (Belgium)**

Optim@ has been created regarding basis of the medical center of Ougrée's community health programme: from 1998 to 2000, the partnership focused on an observation post development in order to improve the population welfare. Since 2001, the first actions have been carried out: they were about socioprofessional integration and dynamization of depressed districts.

In September 1998 a dozen of organizations of Seraing meet tanks to the medical center of Ougrée, to think about the development of socio-sanitary facts daily met on the community territory.

A funding of the Ministry of Health (1998-2003) allows creating an observation post for health: organizing a large partnership of actors, observing socio-sanitary conditions, which are more and more elaborate and suggesting actual solutions to identified problems.

The first results about the observations led in 1999 show that the individual situations are structured according to two directions: the autonomy loss because of the health degradation and the difficulty of social integration, and an economic precariousness due to unemployment and low level of skills.

In 2000, the partners organized two workshops (autonomy and precariousness) to suggest actual actions:

- An experimentation of individual accompaniment for employment seekers, supporting the partnership between social actors, training operators and companies (2001).
- A project about depressed districts dynamisation for people who can not be professionally integrated because of their social condition (2002).

These actions collectively financed by both the Walloon Area and the FSE refer to the same principles: the cooperation of inhabitants and the partnership between actors.

Meantime, the Asbl Optim@ has been created in January, 2001. The partnership has progressively increased in size with about sixty services and the partenarial plan has been structured : in addition to autonomy and precariousness workshops, employment, community health, prevent school dropout and housing are created. By means of actions, inhabitants become partners and take part in the partenarial plan.

Optim@ is an economic and social observation post. It implements continuously the diagnostics of a specified area and more specially its welfare level. It leads the coordination

and the networking of social actors coming from a specific area. It develops with the population of a specified territory, actions aiming to improve its standard of living.

Since 2003, the use of the realized assessment with all the partners specify the role of Optim@ in terms of support given to the main actors.

### **6.2.5. Valdocco (Spain)**

The Centre for Social and Labour Inclusion Valdocco is a private non-profit organization working since 1984 in an especially disadvantaged area of the city of Huelva (Andalusia, Spain).

In the 1980s, the districts located in the North outskirts of the city (Hispanidad and Alcalde Diego Sayago) showed a status of intense socio-economic frailty and social unrest, which meant the classification of this territory as a priority action zone by the Andalusian government. Initially, the Workshop-School Valdocco was created from a social initiative to respond to the abandonment and risk of children and youngsters who were outside educational structures and had misfit and dissocial behavior in a typical setting of the *urban outskirts*: lack of communication and urban abandonment, deterioration, scarce urban facilities, concentration of young population, school failure and desertion, intense unemployment in the family, lack of basic levels of education and professional skills.

The organization, which was born in the 1980s as a Workshop-School, evolves in the 1990s towards an *integral model of intervention*, more complex and diverse: the itinerary of inclusion.

Throughout those years, the reality of the intervention target zone has also evolved, as has done the knowledge about it and about the phenomenon of exclusion itself. The organization has also developed and, after twenty years of experience working on the field, is firmly established in the territory of performance. In this sense, it currently conducts a style of social intervention, with settlement in the area, it is part of a social tissue, and implements a social and educational model of intervention, of social, labour and community inclusion, adapted to the population's diversity of needs, to influence the socio-economic transformation of the area.

Valdocco have a specific intervention model.

The *inclusion itinerary* is supported by the ideas of process and diversification of assistance according to the needs. It is an individualized intervention method which designs a performance strategy based on a previous diagnosis of the target individual's intervention needs. The methodological principles that guide the individual itinerary as an intervention model are inspired by the overall and multi-dimensional approach to the reality that is meant to be changed; flexibility and adaptation of the action to the subject's evolution, i.e., co-evolution; territorial performance and reflection.

It is a global strategy, which articulates several measures of different kinds around an individual project.

It is also a question of taking care of the new emergent issues, not only those coming from the individual's evolution, but also those derived from the signs of frailty showed by the social group or family where the individual comes from.

It considers local development as an element for job creation. Intervention starts from a specific setting. *The individual project is part of a collective project and depends on the perspectives and evolution of the latter.* It focuses on the potentialities rather than on the deficiencies and influences the individual through the environment. This means proximity to and integration in the performer entity's territory.

This requires cooperation with the various agents, participation and co-responsibility in the analyses, proposals and interventions. It also needs combining performance with reflection, a continuous interest for learning and the exchange of experiences in search of possible transfers of methodologies and strategies. In this sense, the evaluation of the action is a basic learning element for the entity.

Intervention is therefore combined with community action. The articulation of channels for public involvement is considered a key element to fight social exclusion and has a multiplying effect. In this sense, the entity's performance is not only the provision of services, but it also assumes the need of detecting, claiming and transforming the conditions that generate and feed exclusion processes.

Currently, the entity's main commitment, in relation to community intervention and territorial action, is the Integral Plan for District V ([www.districto5huelva.org](http://www.districto5huelva.org)). This Plan, which "stems from the participation in the association movement of the District and the relevant public bodies to create a real social contract or commitment to contribute with efficient and integral solutions from public engagement, agreement and participation", is already under way since its approval by the municipal plenary session of November, 2002. The Centre for Social and Labour Inclusion Valdocco, one of the promoters from its participation in the District Municipal Board, presently leads and coordinates the implementation of this Plan of territorial action whose motto reads "life quality for everyone".

The different stages summarized are not arranged in a linear way, but rather, repetitions and interactions appear among them, so it would be better to speak about functions rather than stages. Nevertheless, for the sake of clarity, we present them in a correlative way.

- Reception: It is the first phase of the itinerary, where a first guidance of the intervention is carried out. Reception allows planning the intervention. The strategy proposed by the entity in this phase focuses on strengthening the positive aspects, facilitating participation as an objective and as a principle, and watching over the whole of interventions.

- Information and advice: Users are provided with the information on strategies and resources that can help satisfy their needs. In many cases, derivation to other services and/or structures applies. This function can be developed both in relation to individuals and groups.

- Guidance: It is the accompaniment process in the personal work of defining and establishing a personal project of a vocational career. It is the guidance function, which sets in motion the individual action plan according to personal interests, possibilities and wishes. This phase of the itinerary can be developed as a mainstream from the Workshop-School Valdocco, or individually or in groups through workshops and seminars.

- Training: It is one of the most relevant actions carried out by the organization, given the training shortages of most individuals assisted by the entity. The most integral and lifelong learning is developed at the Workshop-School. This service has two main training points: vocational training and socio-educational training. The duration of this process is around two years and is mainly performed with youngsters.

The organization carries out other training activities aimed at over-18-year-olds: Occupational Vocational Training, which offers, apart from training in the organization, participation in job practices with a duration between six months and one year. This work experience or professional training makes work itself a training instrument. Finally, the organization also offers training in job-seeking techniques.

- Mediation: The entity has an employment exchange database where both employers and employees can meet. The users of this employment exchange database need not previous participation in processes of the itinerary implemented by the organization.

- Mediation for employment: The entity is a promoter of job creation. As such, it takes part in cooperatives and other entities of social economy, especial job centres, and is a founder member of the Andalusian Association of Inclusion Enterprises (EIDA).

- Social inclusion: It is mainly aimed at adolescents and youngsters outside family structures. It is a comprehensive project of attention to these youngsters' basic needs such as food, housing, training and accompaniment to labour inclusion, affective and emotional

support through a network of apartments. The organization currently manages reception apartments and has started the construction of a transit residence centre.

### ***6.3. The Observation Mechanisms***

This section presents three observation mechanisms: ACCEM, ADAPEI and VALDOCCO.

#### **6.3.1. ACCEM's Observation Mechanisms**

ACCEM's observation strategy is articulated through the implementation of Permanent Observation Mechanisms (among all actors involved in the reality, those operating on the ground and those planning and taking decisions in social policy), that allow us to approach reality in a scientific way (quantitatively and qualitatively), analyze it and propose intervention strategies and planning of actions, in consonance with the social problems and needs of the immigrants in our country, a changing problem that requires dynamic tools for observation and analysis.

For this purpose, ACCEM proposes the creation of *cooperative and participatory observation spaces* among public and third sector entities (working directly and transversally with the immigrant community), which generate a comprehensive knowledge on the social, educational and economic situation of immigrants and allow the implementation of actions and the creation of social support networks to facilitate immigrants' integrations processes, especially for those with less resources and in a situation of social exclusion.

The objectives intended from ACCEM's several Observation Mechanisms are:

1.- To analyze in a dynamic way the socio-economic context in which immigrants live, from a territorial and local development perspective, improving the knowledge about the phenomenon of immigration.

2.- To establish processes of cooperation, networking and exchange of information and good practice among the different local actors operating in the territory (social and economic agents, public and private institutions, NGOs, etc.) that allow the analysis, joint action and creation of social support networks to tackle the problems of the target group and of the receiving territories.

3.- To establish processes of participation and accessibility of immigrants in the drawing up, planning and development of actions.

4.- To provide the different actors involved/concerned in the processes of planning and implementation of the different (educational, social, cultural, economic) plans, programmes and projects with:

- Tools for the agreed preparation of indicators on the socioeconomic situation of the target group and area.
- Information for the establishment of hypotheses that allow a more specific, dynamic and updated analysis of the problems of the target group and territory, in order to make it easier for decision makers to design their intervention plans, programmes and projects.

### **6.3.1.1. Territorial System of Socio-professional Competence Management**

Since 1996 and through the Community Initiatives on Employment and Development of Human Resources “HORIZON” and “INTEGRA”, ACCEM starts the testing of a methodology for the implementation of a Territorial System of Socio-professional Competence Management, which enables socio-labour inclusion of asylum seekers, refugees and immigrants in their host receiving territories, by managing their competences (abilities, skills, and attitudes).

One of the basic principles of action for the development of this methodology is « to allow the immigrant community entering a space of dynamic communication and relationship with the different actors directly involved in the processes of labour market inclusion (job-seekers, employers, and professional training mechanisms), to facilitate their labour inclusion in the territory by expressing and showing their social and professional skills ».

For this purpose, and as a complement to the experimentation of the methodology, GINGO, a Skill Management Visualization tool was set into practice. GINGO « Trees of Knowledge » (GINGO les Arbres de connaissances, société Trivium).

The implementation of the Territorial System of Socio-professional Competence Management has been initially carried out in three municipalities:

- Gijón (Asturias) with a population of 270,000 and a traditionally industrial economic context under restructuring and rationalization.
- León, with 140,000 inhabitants and an economic activity focused mainly on the service sector.
- Sigüenza (Guadalajara), with a population of 5,000 and a productive activity based on rural and tourist development.

We are currently working on the implementation of the System in other ACCEM's territorial offices.

The development of the System focuses on two main axes: on the one hand, the «creation of a *partnership* linked to the local, economic and employment development existing in the experimental territories» and, on the other hand, the «design and implementation of the *methodological elements* that enable the management and exploitation of the Skills Visualization instrument».

#### **6.3.1.2. Internal Observation System: GORRION**

Since 1996, and in collaboration with the University of Franche-Comté (Besançon, France) and the University of Huelva (Spain), ACCEM has been implementing a national information system called Gorrion.

Gorrion is a tool of diagnosis, accompaniment and evaluation, which allows us to know the needs and build the profiles and typologies of the target group (asylum applicants, refugees and immigrants) from the different intervention territories where ACCEM operates.

In the period between 1997 and 2005, 80,000 people and 400,000 visits have been registered in the information system for the use of ACCEM's different services and programmes.

We are currently working on the adaptation of the system to the entity's new needs, both conceptual and technologic, called e-Gorrion.

The design of e-Gorrion means, on the one hand, a harmonization and update work of the different recording systems and data sources at internal level (databases of group monitoring) and at external level (statistical records, follow-up reports requested by the government administration, etc.), used by ACCEM on a national scale. On the other hand, it also implies the adaptation of the information system technology.

The instruments to implement this internal information system are the following:

1.- A Harmonized Observation Guide structured from the different processes and stages that occur in the inclusion itineraries of the target group, as follows:

RECEPTION	<ul style="list-style-type: none"> <li>- General descriptive data.</li> <li>- Migrating project origin-arrival to host receiving country.</li> <li>- Social and family status.</li> <li>- Co-habitation and household context.</li> <li>- Socio-health status.</li> <li>- Socio-administrative status.</li> <li>- Socio-economic status.</li> <li>- Socio-educational status.</li> <li>- Labour status: training and employment.</li> </ul>
DIAGNOSIS	<ul style="list-style-type: none"> <li>- Social.</li> <li>- Co-habitation and household context.</li> <li>- Socio-health.</li> <li>- Socio-administrative.</li> <li>- Socio-educational.</li> <li>- Labour: training and employment.</li> </ul>
ACCOMPANIMENT	<ul style="list-style-type: none"> <li>- Social.</li> <li>- Co-habitation and household context.</li> <li>- Socio-health.</li> <li>- Socio-administrative.</li> <li>- Socio-educational.</li> <li>- Labour: training and employment.</li> </ul>
EVALUATION	<ul style="list-style-type: none"> <li>- Social</li> <li>- Co-habitation and household context.</li> <li>- Socio-health.</li> <li>- Socio-administrative.</li> <li>- Socio-educational.</li> <li>- Labour: training and employment.</li> </ul>
EXPLOITATION	<ul style="list-style-type: none"> <li>- Assignment of itinerary of inclusion to national programmes and services.</li> <li>- Assignment of inclusion itinerary to national headquarters.</li> <li>- Assignment of itinerary of inclusion to local programmes according to local offices.</li> <li>- Assignment of itinerary of inclusion according to territorial offices.</li> </ul>

From a methodological perspective, it implies collecting information from the role of observer/participant (listening to the projects, demands, and needs of the target group) by means of (formal and informal) interviews, discussion groups, supporting groups, and all other situations of interaction with the target group which can supply some context (knowledge and information about their social, labour and administrative status).

2.- A conceptual manual for the use of the Guide, whose main aim is to establish a common framework and language at internal level for observation.

3.- A computer programme (presently, epragma) on an Internet platform for the system administration.

By means of this system, we can have at our disposal a joint analysis, diagnosis and evaluation of both the different intervention processes (social, labour, legal, etc.), and the contexts of action (ACCEM territories) where the target group is, so that it allows us to guide

the strategic and operating policy of our Association in the designing of future plans, programmes and projects.

All this means an effort and investment in economic, technological and human resources by the entity, because to introduce and maintain our information system, it is necessary to establish and systematize internal procedures, both in the management of the interventions by ACCEM's different areas and departments, and in the collection of information among the association's technical staff. It has also implied the creation and structuring of technical teams for the management and evaluation of the information system (data analysis and treatment, diagnosis elaboration, technological adaptation, training and accompaniment to the organization's staff...).

### **6.3.1.3. ACCEM's Local Observatories**

As a complement to the Internal Information System GORRION, in 1998 ACCEM, in co-operation with the University of Franche-Comté (Besançon, France), created and set in motion the Permanent Observatory of Immigration of Asturias (ODINA) and the Local Observatory of Sigüenza.

Both Observatories are based on the principles of Territorial Intelligence: public involvement, comprehensive approach to the territory, local actor partnership, information society technologies, accessibility of the information; information quality, and the CATALYSE methodology.

The main aim of these Local Observatories is to generate knowledge on the socioeconomic reality of immigrants, and promote the participation of local actors in the application of strategies and actions that help fighting against precarious and exclusion situations of the migrant population (refugees and immigrants).

The key objectives of these mechanisms are:

1.- A better knowledge of migrants and their host receiving context – identification of needs through the monitoring and evaluation of their integration projects.

2.- A better knowledge of the community actors – to adapt the supply to the demand, to optimize resources and actions.

3.- To locate the socioeconomic context of action – to identify the needs of the migrant community in relation to the autochthonous community.

Along their development during these years both Observatories have undergone different transformations and evolutions. Thus, the Permanent Observatory of Immigration of Asturias (ODINA), apart from its field of regional observation, has consolidated its observation perspective at local level, with the articulation of two Local Observatories, one in Gijón and the other one in Oviedo (2005).

On the other hand, one of the impacts of the development of the Sigüenza Observatory has been the creation of another new one at provincial level, the Observatory of Guadalajara (2005).

Within this context, and as a result, among others, of ACCEM's institutional development and expansion, and also the socioeconomic changes in the intervention territories (e.g.: increase in the immigrant population), new Observatories are set in motion in 2005 in other ACCEM territorial offices, making up a Network of Local Observatories.

The localization and implementation of these new Observatories is carried out in those ACCEM territories where there is already a trajectory and experience in the development of networks and partnership with entities and institutions from the perspective of research and action. As a result, what is intended with this observation strategy is to strengthen and consolidate the actions carried out to implement intervention cooperatives in the territory.

The territories where the new observatories are being developed are Seville and León (2006). The prospects for 2007 are the implementation of two other observatories, in Alzira (Valencia) and in Girona (Catalonia).

For this purpose, as with the internal information system GORRION, different instruments and technologies have been structured for the implementation of this Observation Network:

- A Harmonized Observation Guide CATALYSE for all the partners forming the observation structure in the territories. This Guide is structured in different subsequent stages and processes in the inclusion itineraries of immigrants (Reception, Guidance, Education, Training, Employment, Housing, Health, Autonomy, Diagnosis, and Evaluation).

- A Conceptual Manual for the use of the Guide, whose main aim is to establish a common framework and language at internal level for observation.

- Tool 1: Accompaniment, diagnosis and evaluation (PRAGMA software).

- Tool 2: List of Actors and Actions for Integration.

- Tool 3: Territorial Information Systems (databases and context indicators).

#### **6.3.1.4. Expected Results and Impacts of the Observation Mechanisms**

The results and impacts expected by ACCEM in relation with the objectives of its strategy and its observation mechanisms are the following:

- A more specific and dynamic knowledge of the needs and problems identified and felt by the community of immigrants and their socio-economic setting.
- A reinforcement in the processes of partnership development among public/private institutions/entities and social and economic agents for the mobilization of all the available resources, which will provide dynamics of social and labour inclusion of migrants, and of the autochthonous population in a transversal way.
- A better definition and planning of the project of social and labour inclusion of immigrants living in the mechanism target territories.
- Complementarily of resources and actions among public entities and the third sector.
- Information accessibility for immigrants and general population.
- Improvement of immigrant participation and decision-making processes and development of programmes and projects of social integration in the receiving society.
- Strengthening co-habitation among the foreign population and the receiving society, through mixed participation mechanisms and spaces.
- Better (quantitative and qualitative) knowledge of the phenomenon of immigration from a comprehensive and cooperative perspective, and from a territorial and local approach.
- More specific, dynamic and optimized visibility of the social resources available in the territory to meet the target group's needs.
- Improvement of the processes of exchange of information, data, studies and publications on the community knowledge among actors of the research field.
- Joint planning of actions aimed at promoting the processes of the target group integration, out of a cooperative diagnosis among the organizations and institutions involved in the Observational Mechanism.

#### **6.3.1.5. Observation Mechanism Management and Coordination Team**

To tackle the implementation of different Observation Mechanisms, several Work Teams have been created in ACCEM, which will be in charge of steering and managing the

different implementation processes. This team is made of different work groups according to their functions and tasks:

- Strategic Monitoring Group: Made up of the entity's managing boards (ACCEM Director, Subdirector, Territorial Responsibles) and the coordinator of the Observation Mechanisms of the University of Franche-Comté of Besançon in charge of monitoring the dimensions and strategic objectives of the System.

- Master Group: Made up technical staff from different territorial offices of ACCEM, mainly from the areas where the first Local Observatories (Gijón and Sigüenza) were established and from those where the Territorial System for the Management of Socio-professional Competences (Gijón, León and Sigüenza) has been implemented. Their main tasks are the conceptual design and implementation of Observation Instruments, as well as the transfer of training to the members of the Junior Group (ACCEM's technical staff coming from the new territories entering the Observational Mechanism).

- Junior Group: made up of technical staff coming from ACCEM's different territorial offices. Their main task is to be the technical referent of the Observation Mechanisms (E-Gorrion and Observatories) for their territory of intervention (introduction of Observation Instruments).

## **6.3.2. Adapei's Observation Mechanisms**

### **6.3.2.1. "PARADA". Observation post of the Adapei's users integration paths.**

#### **6.3.2.1.1. Definition of the tool**

Many meetings between social workers and MTI Center researchers enabled defining an observation strategy and create the collecting documents to get the required data.

The first meetings focused on the definition of social workers needs in terms of "data-collecting" (about the knowledge and follow-up of users, who call upon the SASP or SIP), and their expectations of a computing resource.

This reflection enabled specifying the useful information for the daily activity of social workers, but also for the paths assessment and the establishing of periodical progress reports.

It was especially important that the social workers take part in the development of the data collecting schedule that they want use, that is to say a schedule containing information considered as a necessity to realize the people accompaniment.

The first defined documents met enough the social workers requirements so that they begin to appropriate the tool in the making.

During this period, the reflection of the MTI@SHS Center referred to the differentiation of the data useful for the management of the users' files as well as the ones required for the application of their paths assessment, which are not necessarily known immediately.

Some data have this double position, which results from the administrative level and brings facts for the assessment.

On the basis of our background in the field of the social work, MTI@SHS had made an initial suggestion of indicators to indicate a user path, but these ones should be perfected and adapted to the disability environment.

The multiple social or professional interventions of reception and accompaniment, used by social workers, have been then listed.

This work has been the opportunity to open a reflection between the SASP / SIP's social workers about their respective practices, and to organize a discussion about the mutual understanding of their actions.

That proved itself to be all the more profitable as they were members of two distinct services and even if the dialog were already existent, they have found a supplementary

opportunity to talk about their respective practices, and better understand the complementarity of their interventions.

The development then the adoption of a common language was a fundamental phase to the tools setting up; its keeping guarantees the homogeneity of data.

Indeed, the plan issue, more than making easier the daily files management, is to succeed in mutualising data, in order to provide achieved synthesis about the users conditions by many social workers, to lead collectively a thought about the integration paths or produce global statistics.

Thus, it was determinant that everyone chooses this language, and gives a known signification accepted by everyone to the used terms.

Many meetings have been required to develop it, and others have been also useful to enable its development and to preserve the mobilization of the actors. The necessity to carry on the discussion about the different used terms also derives from the regular integration of new persons into the social team; debates opened during the meetings help them to know and absorb easier this language than the only read of the software users guide.

#### **6.3.2.1.2. « PARADA » software development**

In the same way, the conception of the data processing tool started, the software called PARADA, developed by the MTI@SHS Center.

A user file incorporates the whole information required to the social workers for assuring the reception and the accompaniment of this person. They comprise both the main information about the person, useful within the accompaniment framework – civil status, housing information, health, professional status...- and all the actions that this user has benefited from the beginning of its support – contacts with the social workers, approaches made by these last ones, with the user or in her / his favor beyond her / his presence, etc...

At every intervention, the members of SASP / SIP services fill in an « intervention form », which enables keeping an indication of the actions, and if necessary, to take note of the adjustments to make about the user's file.

Every accomplished intervention is consequently kept in the software with the following indications: type, content, date, aim...During every intervention, the elements about the person's conditions can be updated if necessary (changing of professional status, of

housing, driving license achievement...); information about the previous interventions stays memorized and can be consulted every time.

This data filing enables the follow-up of the users integration path development, and gives the essential information to work on its assessment.

During this phase of development, a considering get opened about the information sharing, because if it can be usual to keep information about an user in a paper file potentially accessible to everyone, we notice some reluctances when this information must be saved on a digital support.

The PARADA software has been developed between 1997 and 2000, in accordance with the deontological demands; it is compatible with the norms defined in France by the National Committee for Computing and Liberty (CNIL).

The data access is secured thanks to the use of identifying and passwords, and the possibility to define different levels of use (consultation only, amendment – creation, amendment – creation – suppression), and restrictions to the data access according to its type.

Every user of these services is informed about the opening of its data processing file, and can every time ask for its consultation. This possibility certifies the integrity of the data and observations captured in the software.

At last, the integral data property remains acquired by the service, which can only determine a possible partial opening for partner organisms; within an actors' network, it is for instance possible to declare the pooling of administrative data and keep at the same time a reserved access for more confidential data (medical information, judicial information...).

The computerization issues within the social work are very important, and are not affected by skipping a deontological considering.

The initial software evolved in relation to new requests, which derived from the social team, and needed some innovation efforts in order to develop technical solutions enabled satisfying requirements.

The software was initially a single user tool, developed in order to every social worker manages the files of the user that he / she supports. It evolved towards a solution usable in network, in which everyone can access files.

Thanks to the core flexibility used to develop the PARADA software, the existent tool could have been personalized to be conforming to the team demands.

During the successive phases of experimentation, social workers accepted to work on non-finalized versions, which enable detecting and quickly correct technical problems appearing only within the framework of a real-size use, especially at the moment of the installation of the network first version; this implication could also lead to actual suggestions about the software fitting-out.

#### **6.3.2.1.3. Data processing tool impact**

In comparison with a manual note-taking, the PARADA software makes easier the information access, this last one being always stocked in the same way. It is true at the level of every social worker, and more noticeable when several members of the social team work collectively with a user ; they can like this know the situation day to day of the supported person, as well as the interventions that he / she could already benefit, and the aims in progress, in order to adapt for the best their action.

However, this tool do not suppress the exchange time between social workers, it optimizes them because from now on these meetings are not devoted to get informed about what have been done, but work together on the condition of this person, knowingly.

PARADA enables also making easier the transfer conditions, when the accompaniment of a person moves from a social worker to another, all the useful information being held in the user's file.

In addition to this stepped-up facility in the field of the information sharing, one of the relevance of the PARADA software is to stock data, which enables:

- At a global level realizing automatically:
  - Reports of which results are going to provide the common considering led by the team about its activity in order to determine the orientations of the service.
  - Statistics regularly requested by various providers.
  - Users' lists or counts in relation to different criterions: beneficiaries of a measure, employment seekers available, less than 26 years of age...
- At an individual level, exporting the information of users' files in order to produce:
  - An administrative information form useful to the secretariat.
  - A timeline of interventions in order to make easier the annual synthesis written by the social workers about every user.

- A detailed statement about the progress of the people's condition in order to open the reflection about the notion of integration path.

But the benefits of the mutualization that PARADA supports are also the following ones, according to the professionals, social workers as well as secretariat:

- Centralization of files in order to consider systematically all the users in the reports and then decrease the risk of mistakes.

- Saving time for the daily follow-up of users in comparison with « paper » files, thanks to the organization and data entry, which enable finding every information according to the date, hour, type, present partners...

- Saving time during the period of activity reports for the various financial supporters of the SASP / SIP.

- Reliability of administrative data.

- Necessity to synthesize and organize the actions with the help of the words and ideas format (obligation of reflection before the writing, what leads simultaneously to the organization of the following approaches: a return to practice in order to have best-adapted answers).

- No influence on the methods of usual interventions.

We note that if the software is not used with direct data storage during the actions led to the users, time devoted to the exchanges content, the software presents anyway some benefits for the users:

- Promptness of answer to the department interpellations by the users or by the associated services.

- Quality, reliability of the given answer whoever is the interlocutor (secretary , referent or his / her colleague in her / his absence).

- More specified reports, more reliable, statistics adapted to the decision-making about the department orientations and possible funding thanks to a best view of the users' path.

#### **6.3.2.1.4. Difficulties**

- Very long work to develop (about 4 years).

- Staff fears at the hands of change of work habits, possible risks of “control” due to the data gathering and their use by the direction, deontological implications.
- Necessity to train the staff when the software installation goes on in order that everyone appropriates it ; necessity for regular assessments.
- Necessity to train all the staff about the writings and note taking.
- Importance to take time for entering regularly data in a codified form, with an unusual strictness in the social sector.
- Difficulty for professionals to adapt themselves to computing, which is little used in the social sector.
- Questioning about the organization of the data entry and the data update: by an only and same one person or each user’s referent ?
- Regular reassessment of the follow-up processes, services, reports types imposed by financial supporters, which requires an important flexibility and reactivity to the management of the software development in an autonomous way.
- Necessity to look after PARADA in order that it remains a tool to individualize paths, and not only a statistics tool.

#### **6.3.2.1.5. Prospects**

The development of this software has been unquestionably supported by the demand arising from the social team, which took part in a broader approach of this institution, aiming mainly the improvement of the service made to users.

The tools have been developed with the help of an efficient partnership between the social workers and the MTI@SHS Center, which assured both the methodological contribution and the availability of innovative technical solutions in order to develop a software satisfying both their expectation and the less distinguishable demands of the assessment. This establishment with partners partially explains for the matter the length of the software development phase.

PARADA is a user friendly software, which supports an access secure and opened to the information, because this last one is always regulated according to the same rules, and also always available.

On that account, the contributions of information technology about the mutualization of information are undeniable.

A secure version of PARADA works in network since 1999, it is established in the both SASP and SIP services.

It supports the accompaniment of about 350 users.

The reflection led by the social workers with the methodological help of the MTI@SHS Center has proceeded until 2002 about the indicators used for extracting data, in order to optimize the development of users' integration paths.

It also proceeds with a seeking of a more important tool personalization to improve the individualization of paths.

It also appears during this period the necessity to enable a more important personalization of the system in order that PARADA be independently used by services (for the changes of items, interventions, financial supporters' requests...), for a better adaptation and answer promptness to the context modifications particularly.

### **6.3.2.2. “Database and tool of collective assessment online in the framework of an “EXIGENCE” regional partnership”**

#### **6.3.2.2.1. Definition of the tool**

The assessment in which the tool participates, will respond to the ethical principles of sustainable development within its social acceptance:

- Users participation (only information given by the users are captured).
- Global approach of the people situation, multidisciplinary (required data captured as much as possible, within the limits of what the people control by their own).
- Actors' partnership (maximum transferability of the tool).

It will allow the actors to make sure that the led actions satisfy the users needs.

This assessment refers to the follow-up paths of users within the actions of social accompaniment, employment access and employment, with the help of diagnostics guides and assessment forms, which regularly debrief about the actions performed by each user and the progress of its condition.

As a result of the partnership regional configuration, it is a distinctive discussion guide, which calls upon the NTIC for more communication facility, secure, available on the partnership intranet site by the partners for data entry, consultation, interventions creation, and which also enables the implementation of instrument panels concerning the actions and various criterion.

This questionnaire actually is a discussion guide common to the 7 partners involved in the fields of:

- The employment access.
- The training.
- The socioprofessional accompaniment.

It represents a person's file, holding useful information to provide assessment statistics of actions and participate to the people follow-up.

The questionnaire aims to fill in what is possible only during the gathering of data given by the user, and regularly update information according to the progress of the person's condition.

The discussion guide gives details about the user's condition when he / she starts the plan and when he / she leaves it, as well as the actions made available. It comprises 3 parts:

- The first part (reception), includes general information, often obtained from the first discussion with the person. In the beginning of the questionnaire, it is planned that each action of the partnership has its own code, as well as each partner structure in order to provide individualized statistics.

It is also possible to make appear further codes if many services are concerned by the actions, even codes corresponding with referents within the services.

The user is anonymously encoded (with a number).

The « communes » codes correspond with INSEE codes.

The CLI codes correspond with the dividing planned by the RMI.

The EAMS means the Medico-social Actions Areas.

Concerning the user's birth date, its entry will later enable the automatic calculation of age groups.

- The second part (diagnostics) gets onto the questions of the first part by completing them (housing, health, employment...). It ends with the actions of integration that the supporter and the person intend to introduce. It only means priority needs and then it is worth keeping only at this point the necessary propositions, in a realistic way, accounting for the interested period, the real condition of the person and the resources we have.

- The third part refers to the follow-up and the assessment of the person's condition, registering the realized actions and the condition at the end of the support. Thus, the assessment is developed in terms of efficiency and results from the comparison between what has been planned and what has been realized. If the initial objective is not accomplished by the person, it will be appropriate that the supporter answer to the question « why ? » (unrealistic project, lack of resources...). The assessment enables in this way reconsidering internally the individual follow-up and the users condition.

This third part will be updated every term. However, according to the obtained results, it will may be necessary to rework the part « diagnostics » for this occasion.

We emphasize that the work concerning the interpretation of the obtained answers pertains to the supporter, social worker, with a deep involvement of the user, and spreads over many discussions from guides and forms, which will be specified by the partnership members with the help of the MTI@SHS Center, as well as the indicators and benchmarks.

They will enable describing the progress of:

- The condition of each user.
- Users groups.
- All the users by taking into account their advancement in quantitative and qualitative ways (data analysis, definition of individual profile and needs).

The assessment will be also about:

- The efficiency (anticipations / executions).
- The performance (resources / objectives).
- The relevance (actions objectives / users and territory needs).
- The cohesion (link between the actions).
- The impact (project / context) of various actions led by the partners, by controlling if the initial objective has been accomplished.

But it will be also about:

- The accessibility (understanding and use of tools and procedures).
- The acceptability (perception of created tools and procedures).
- The equity (use of public funding).

At last, these tools should be modelized later in order to improve their transferability.

#### **6.3.2.2.2. Development of the « EXIGENCE » tool**

First of all, the partners work on the assessment questionnaire, which will enable observing the progress of the supported users condition, and will retrace the efforts given by all the partners about the questions chosen within the Exigence project.

Every suggested question and item is controlled in comparison with its adaptation to all the partners, is amended, modified, tested and confirmed by these last ones as soon as possible in the beginning of the project, they certify a maximal time use of the tool within the best circumstances.

Annual updating of the questions are planned, they enables canceling the non-used questions by the partners or add those, which may break the use.

The questionnaire can be used for statistics purposes of three types:

- Quantitative analysis.
- Comparison with contextual data.
- Data analysis, contingency table (definition of individual profile and needs).

The assessment process, performed in a short time (quarterly time) thanks to the PRAGMA software developed by the MTI@SHS Center, should eventually enable a regular observation about the evolution of the person condition, with the help of a comparison on the intranet site about the evolutions noticed since the last performed assessment.

In this way, the MTI@SHS Center works out in collaboration with the project partners, an instrument panel of actions follow-up, which enables at the same time obtaining an assessment of the results achieved thanks to a structure and a global assessment.

In the end, the tool is used by every partner who wants it, according to its own requests, with an accompaniment of the accompaniment teams, social workers and secretariat, responsible for its use.

Qualitative conclusions may also be drawn from this tool about the survey of partners contacts and the impacts they imply, but also about the survey concerning the efficiency and relevance of actions.

Now, it is the question of delineating the way of quantifying this information and its surplus value in order to become the source of useful information, which enables the partners to make durable their actions and get ulterior and complementary co-funding.

“What is determinant, it is the reality of need, in other words, the social demand. Because the risk of the experimentation, is about inventing the social demand ; it is the obstacle to avoid”.

#### **6.3.2.2.3. « EXIGENCE » tool impacts**

For institutions:

- Introduction of an assessment culture (complementary theoretical contributions to lay the milestones of integration paths, through a guide creation, reference system about the logics of socioprofessional integration through a global and individualized support of users and more especially within the training actions through the creation of a frame of reference concerning the accompaniment and access logics to the adapted training).

- Introduction of a project methodology culture (indicating its objectives, the survey of its feasibility, the strategies to elaborate, the actions assessment).

- Introduction of a cooperation culture (common work within think tanks and creation groups, unanimous validation of the choices progressively kept during the project progress).

- Introduction or diffusion of the NTIC as a social work's support, without resistance ; that is why that the shared follow-up online is a momentous progress.

- Training of all the staffs about the use of the tool online, social workers and secretariat.

- Acquisition of observation, statements, analysis and interpretation of results incurred concerning the users condition and the actions led by the partners within this framework.

- Quarterly and annual statistics during the 3 years of the program development.

- Annual qualitative analysis of these results, interpretation and conclusions in relation to the actions, the users condition, the cooperative work in partnership.

- Facility of use by everyone, direct users or decision-makers.

- Global and dynamic vision of the users' integration path.

For users: same impacts as those of the PARADA software.

#### **6.3.2.2.4. Difficulties**

- Difficulty to adapt the indicators of users progress to the partners needs, whose activities are very diversified, in terms of production of individual assessment per structure or action.

- The database does not enable storing workable information about the socioprofessional capacities and skills of users required on workstations, what involves the use of other assessment tools in parallel.

- The type of partnership, extended on a large heterogeneous geographic zone, which have some well-marked orientations (rural, urban, border, industrial zones or on the contrary turned onto the service sector...) has as a consequence an important diversity of partners activities, as well as partners practices.

This territory profile does not favor, with some exceptions, cooperation even a strong complementarity between partners, considering the supported population is very little autonomous.

In that way, the assessment was only able to highlight the specific nature of each partnership member, and not to give a homogeneous image of actions complementarity for a real surplus value.

Despite the registered progresses in relation to the PARADA software, the Equal database / assessment tool does not always seem to be easily and quickly modifiable, adaptable to modifications due to the environment progress all the more so as during the project, the adapted legislation and plans considerably evolved.

#### **6.3.2.2.5. Prospects**

Beginning with a software used by only one institution (about 350 users) to lead to a database and online assessment tools for a partnerial use on a broad territory (about 750 users), during almost 10 years, the progress of observation systems about target populations should yet meet transformations in order to be perfectly adapted to the social workers needs.

Therefore, it is necessary to underline that this long period of research and experimentation enabled fundamentally changing users mentalities, with the help of a distinct evolution about the appropriation of the assessment concept and its results in terms of actions to lead.

This positive change is not only related to the research and the experimentation of computerized systems, but also to the principle of networking and the partnerial work realized about the essential concepts of socioprofessional accompaniment line of work.

This work led to the creation of guides, reference system of socioprofessional logics through a global and individualized support of users, and logics of access and accompaniment to adapted training.

In order to have a good appropriation of a data-gathering and future assessment system, it will be suitable for these reference systems to be integrated to its use guide.

Considering the investment of every kind realized during the 10 last years about this, which symbolizes a real stowing point for the practices capitalization and their transferability, it appears necessary at the end of the realization phase of the Equal program to follow the works in order to come up to institutions and Europe's requirements more efficiently to improve practices and the quality of beneficiaries support.

The accomplishment phase of the Equal project is marked by significant results for employment access of these persons, which deserve an evaluation in respect to the phase about capitalization and dissemination of this project.

### **6.3.2.3. OSUA: an online cooperative computerized system of information**

As agreed upon at the time of this project organization, specifications enabled organizing the accomplishment of an online assessment tool about socioprofessional integration paths of Adapei's users and its partners of the Exigence project.

This common software should satisfy this objective of assessment: statistics processing's are then preponderant, and in order that they can happen, some data should be stocked in, structured and consequently captured beforehand.

The preliminary objective such as it has been defined intends to estimate a specific item: the socioprofessional integration paths. That presumes that the system is able to manage some "paths". The solution recommended here is to generate a data gathering for every intervention concerning the beneficiary. Every act gives rise to a "shot" of the exact situation, what enables, in the manner of an animation, obtaining, a "film" of the path when we scroll each intervention one after the other.

At first, it has been required to realize requirement specifications for the conception of common software about administrative data-gathering and beneficiaries' paths follow-up.

As described previously, it has been realized by the MTI @ SHS Center of the university of Franche-Comté in collaboration with the Adapei of Besançon sectors and partnership members of the Equal “Exigence” Action 2.

Because a good knowledge of the issues the software represents pass through a structured information, all the needs levels of sectors have been studied by the MTI@SHS laboratory, what required to practice the analysis of posts of work.

Indeed, before starting the software programming phase, it was important to understand the project’s context, the users of the system, the tasks, at which the system will meet, the technologies to choose in accordance with these points. It is a necessary global approach in order that the programming is executed without waste of time, energy or finances.

The requirement specifications have been realized on the basis of discussions, information collecting, forms and software habitually used by the system future users, and within the respect and knowledge of the legislative and administrative context, which claims this type of tool (law 2002-2, ISO 9001 v. 2000 norms, associative project...).

The requirement specifications are based on the setting forth and assessment of potential users’ needs, their institutional and functional analysis.

They introduce software specifications: functionalities, recommended web surfing schemes, necessary ergonomics, entry, processing's... They will be used as a guide about practical and technical accomplishment of the software, but they also present a set of technical and methodological references necessary to carry the project through.

The logic of such a document is the following:

- Identification of persons in charge and writers.
- Contextual analysis.
- Analysis of the existent.
- Needs setting forth based on the sector description, the structures composing the sector, the users supported by the sector, the funding processes.

The method chosen for the writing of this document comprised a phase of setting forth then needs analysis. A schedule, has been then collectively drawn up (suggested by the MTI@SHS Center, tested within the SMO sector, adapted then confirmed by the executive committee).

- Life Reception Sector.
- Childhood Sector.
- Open Setting Services (SMO) Sector.
- Housing Structures Sector.
- Protected Work Sector.
- Main Office Social Service.
- SPI: Individualized Service for Integration of the Mont-Roland academy in Dole (39), partner of the Exigence PDD.

A fundamental documents set, paper and electronic, has been collected in all the partners, in order to programme the common software.

Many have been useful to the questions creation from a methodological and technical point of view, because they can contain the indications of (and about) the different sections and standards list necessary to satisfy informational and statistical needs.

Others enabled understanding what the modes of internal communication about information are in order to implement them.

The implementation of the quality approach enabled for instance modelizing then formalizing most of the acts necessary to the path follow-up: it will be sufficient at the time of the programming to use them in order that the necessary questions and the information path be inferred.

These documents enable understanding how work daily the software users, and enabled writing the requirement specifications.

In the same manner, some structures are fitted out computerized systems in order to manage their information. In addition to those we know because we developed them (Planning, Siage), we were able to refer others and test them internally.

Some are very elaborated (software packages specifically developed), others are more “basic” (semi-automatic spreadsheets).

Most of them are useful to understand how the information is managed up to now, and most of all to recognize how the statistical processing's are required by the plans.

The creation of this unique software aims above all to avoid entering 5 times the same information about the same user, in 5 different systems. It is what happens at this time for some SASP and SIP users, for instance.

The assessment of this software completes these requirement specifications and has been demanded to form a part of the analysis schedule for the various sectors.

In the end, it appears that the specific software, for most of them, could be replaced with the common software (Parada, Siage, those of some departments, semi-automatic Excel spreadsheets...).

Others must be evaluated during the software programming in order to formalize the files structures for imports and exports.

A steering committee has been made in order to pool and confirm decisions and choices made within the elaboration of the information system. It gets together providers involved in the Action 3, concerned teams of the general management (DG, computer department, Europe section, research and development, quality), and department heads of the Adapei of Besançon and external partners also stakeholders within the project.

A task group has also been created, responsible of taking part in the elaboration of requirement specifications then capitalizing the framework and the basic data of the common software: between 10 and 15 persons originally from external medico-social structures, every departments of the Adapei of Besançon, providers, general management of the Adapei of Besançon and the one of Baume-les-Dames (25).

This group works about the gathering of information needs and instrument panels to constitute the software, in relation with themes of global accompaniment: reception entrance, social and administrative data, health, mobility / transport, schooling, employment, housing, leisure / holidays, resources management.

It also works about the software environment: glossary of used terms, codification of users files, documentary charter, users profile, charter / instructions for use (interactivities, story board), users and processing's management.

The tool is developed on the basis of the demands of the ISO 9001: 2000 norm, in reference to the general management authentication of the Adapei of Besançon in December 2005, in order to certify an adapted tool of global and distinctive path follow-up for users.

Indeed, this norm is demanding about the system of quality management in a structure of goods or services production (in this case), but also about the growth of “clients” satisfaction (users, their families, public authority and financial supporters, external partners).

It is in that way that the computer system developed during the Equal project will incorporate from its conception, the required demands for the implementation of “projects of distinctive accompaniment of beneficiaries”. It will be the tool of realization and coordination, meeting then largely the legal requirements.

<b>Phases of information system conception</b>	
<p style="text-align: center;"><b>First phase : Existent</b></p> <ul style="list-style-type: none"> <li>- Analysis of the Adapei’s computer architecture</li> <li>- Analysis of current developments</li> <li>- Siage ; - Parada ; - Pragma</li> <li>- Retrieval of existent data for implementation in the new information system</li> </ul>	<p style="text-align: center;"><b>Third phase : Survey</b></p> <ul style="list-style-type: none"> <li>- Graphic and ergonomic Design (esthetics, etc.)</li> <li>- Scenario of interactivity (story-board of the application)</li> <li>- Architecture and technology of development (computer scheme)</li> <li>- Data entry (use flexibility, etc.)</li> <li>- Data processing (export, pdf-creator, statistics, etc...)</li> </ul>
<p style="text-align: center;"><b>Second phase : Project management</b></p> <ul style="list-style-type: none"> <li>- Task groups creation (Referent Software)</li> <li>- Modelization of a retro planning</li> <li>- Meeting with the referent software</li> <li>- Collection of users expectations (in process with MTI questionnaire)</li> <li>- Survey of requirements feasibility</li> <li>- Follow-up of writing and data modelization training</li> <li>- Writing of the functional charter</li> <li>- Writing of the ergonomic charter</li> <li>- Writing of the computer and security charter</li> </ul>	<p style="text-align: center;"><b>Fourth Phase : Production</b></p> <ul style="list-style-type: none"> <li>- Implementation of the tests server (seen with Florence MASSON)</li> <li>- Putting into production of the application with planning of validation meetings</li> <li>- Opening of beta-test accounts</li> <li>- Being in real condition</li> </ul>
<b>Fifth Phase : Promotion and accompaniment</b>	
<ul style="list-style-type: none"> <li>- Presentation of the application (planning a presentation day with demonstrations)</li> <li>- Promotion of the application (use flexibility, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>- Accompaniment for the launching</li> <li>- Writing of use bases</li> <li>- Training of referent software</li> <li>- Users training (pilots)</li> </ul>
Source: Adapei (2006).	

#### **6.3.2.3.1. Impacts**

The phases about realization of requirement specifications, conception of methodology for the computer system realization, research of the partnership enlargement, linking up with the legislation and the ISO 9001: 2000 norm have underlined the enlargement of the initial project in order that the tool be the most comprehensive and fitted to every kind of situations, structures and users.

This impact is also due to an important mobilization of referent persons, internal or external, about this project, thanks to an awareness about the fact that the system eventually represents the accompaniment and coordination tool of actions led for users, regarding the respect of the new legislation (individual project of users, internal and external assessment of structures) and the new ratemaking systems.

The whole actors of the considered system conception and spreading has strongly vested the project and contributed to develop it during the six first months of the project, in order to make it become beyond the projections:

- A real platform of cooperative work opened to external stakeholders of users accompaniment, established according to a core program of data and specific modules adapted to various types of support.

- A tool of management in relation with the ISO 9001 authentication, on the basis of a common vocabulary (glossary), fundamental to the assessment culture, which is from now on the one of the whole medico-social sector since the publication of 2002-2 decrees.

- A system which involves a necessary training / action / guidance for its future use in terms of coordination.

- A tool which, considering its new scope and the actors that it reaches, should incorporate an assessment phase by the internal and external users.

- A project which will need a reinforced communication / presentation considering the partnership enlargement planned for its spreading.

- A comprehensive tool of users socioprofessional accompaniment for a better support.

Within these conditions, from the end of 2005, it appeared that a reinforcement of fundings and initial project length occurs from 2006.

#### **6.3.2.3.2. Registered difficulties**

- Schedule limited because of European fundings (at first, we dispose of 18 months for realizing, testing and using the system; at the end, we wish that these details lengthen to 12 additional months).

- Funding limited because of the amount allowed within the Equal project framework ; a reinforcement ha been requested in order to incorporate the whole works, for which needs came to the fore until this day (in particular possibility to add specific modules to the different sectors of activity).

#### **6.3.2.3.3. Prospects**

Globally:

This database is adapted to every sector of the association for the accompaniment of about 1 000 persons with a disability, as well as every partner or medico-social actor in charge of the socioprofessional integration of persons in important difficulties.

In addition to this transferability made possible thanks to the flexibility of the system under conception, one of its great feature is to open the enrichment of data concerning a user to external partners and to enable in this regard practicing a real coordination within the framework of its global and individualized accompaniment project.

The system will be efficient from the end of the year 2006 for experimentation.

Since 1999, beginning date of the PARADA software experimentation, which one has been developed for a service within a difficult and long scope considering the professional revolution that represented the computer use for the beneficiaries follow-up, we can see that the collective database / assessment tool via intranet Exigence from 2002 enabled the opening of this type of practice to a work in partnership, even if it showed in the same time its limits.

The project led since 2005, benefits from both conclusions drew about its experiences especially from the points of view of mentalities, needs in relation with the law 2002-2 and demands of the ISO 9001 v.2000 norm, as well as significant technological progresses registered.

### **6.3.3. Valdocco's Observation Mechanism**

Geysa is a useful information system for the Management, Evaluation and Monitoring of the actions performed by this organization. It is therefore a question of adapting one of the tools of the Catalyse toolkit to the characteristics of the organization and the setting where it implements its actions.

The application of the Catalyse methodology general principles to this tool means:

- Participation: Referred to the people who perform intervention, who also are often considered as mere performers. It is a question of getting the performers of the actions involved in the system design phase. Once it has been set in motion, the system is a self-evaluation and participatory evaluation tool.

- Comprehensive and balanced approach: In the professional field, this goes against the sectorization of services and the compartmentation and individual ownership of information. The system must allow the corporate use of the information produced or acquired by the performers of the actions. Comprehensiveness also refers to the multi-dimensionality of the diagnoses and evaluations carried out from the data collected by the system. In this sense, the system must allow conducting multi-dimensional analyses of the collected data.

- Actor partnership: It implies the coordination of the agents in charge of implementing territorial and individual actions. It is therefore a question of making this coordination easier by means of a shared information source, avoiding duplication of forms or files in the different services or programmes offered by the organization.

#### **6.3.3.1. Objectives, Requirements, and Characteristics of the System**

In general, the objectives that must be considered when designing an information system of this nature are included in several publications<sup>2</sup>.

- First, the information system must contribute to decision making and to the general and specific planning processes of the organization.

- Second, it aims to provide communication in both directions. That is, it must allow the organization to know in real time the situation of each of the services and programmes in progress, the actions, the user characteristics and their evolution. It is also intended that each

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<sup>2</sup> The scheme proposed by Díaz Rodríguez, 2001:64 has been followed.

unit may know the situation of its own service and users, as well as the general situation of the whole organization.

- Third, the system must guarantee the continuity of the information. In the case of Geysa, since they are individual itineraries, the system must keep the histories so that it is possible to analyze the time evolution of individual situations.

In turn, the confidentiality of the data must be guaranteed. The system must take into account the protection of all data, especially those referred to individual issues.

Also, the system must provide information, which is compatible with that of the setting where it is being developed.

The network must be added to all this. Today there is no point in speaking about information systems without taking into account their implementation within a network. Maintaining data updated with a number of services or management units makes it necessary. In the specific case of the Centre for Social and Labour Inclusion Valdocco, given the shortage of resources, the system is designed with a networking perspective, but it is not possible to do so until 2005.

Since the different services of the organization work in an individualized way with each of the target persons, but from a community approach, the information system must contribute to:

- Identify and know the needs of the target group.
- Build the group profiles and typologies.
- Elaborate diagnoses and evaluations of the actions performed and of the whole organization itself.

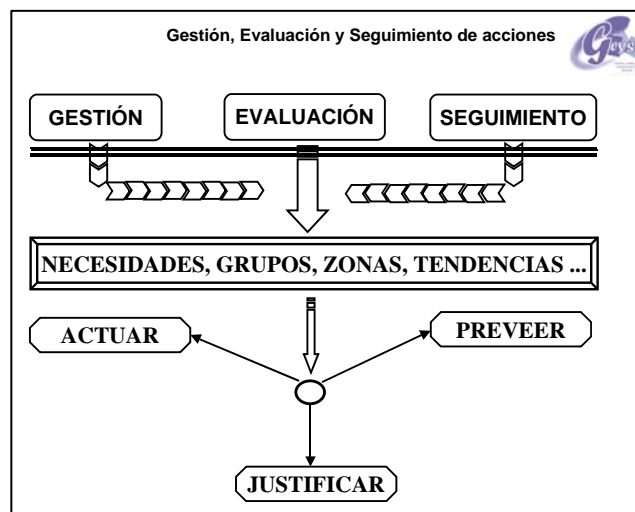
These last three elements give the Geysa system its specific nature. They imply accessibility to treatment and use of the recorded data and the use of accurate statistical techniques.

As a result, as regards users, the system must allow the elaboration of diagnoses, and the monitoring and evaluation of the individual itinerary. As regards the organization, it must provide management indicators, which have not been previously defined and simplify organizational and administrative aspects by unifying data collection instruments.

It must be also taken into account that, for the sake of the feasibility of a system's introduction, which requires the involvement of its users, it needs to be useful. It must be a helping instrument in the daily work of socio-educational staff, which should not cause farther difficulty in its daily use.

As a result, the Action Management, Evaluation and Monitoring System is thought as a single information system for the whole organization which enables the implementation of all the tasks requiring the management of the data regenerated by the organization itself. The orientation of the system is triple: we intend the system to be useful for the management, evaluation and monitoring of the individualized actions (monitoring of users' individual itineraries), to the different services or departments of the organization, and at the same time, to allow the achievement of these tasks referred to the whole organization.

**Chart: Geysa. Action Management, Evaluation and Monitoring.**



Source: Asensio, 2005.

Although it is true that the introduction of an information system in any organization can, and certainly must, modify some procedures and habits of the different services and employees, we must avoid the modification of the organization's reality, which is actually what the system wants to show. In short, the system should reflect the organization's reality rather than the other way round.

All this has led us to design an information system with the following characteristics:

- It is a user-friendly system: To guarantee its feasibility, the persons who must complete it must also be users.

- Flexible: Flexibility is referred to the ability of making changes and adding modules. This affects both the software and the contents. It must be flexible to guarantee its continuity on the medium term, but it also needs the gathered contents to be oriented to specific objectives.

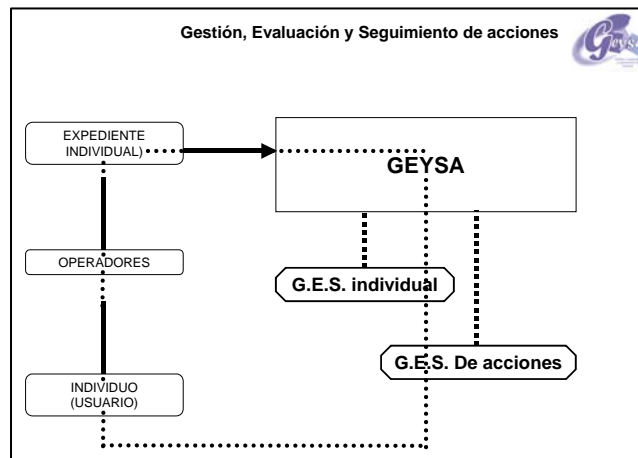
- Objective-free: this affects mostly to the contents. The contents have not been established thinking on specific objectives, but rather on the relevance of the information itself. This way, it allows us to make individual, group and territorial diagnoses. Also, it must allow the evaluation of individual itineraries, services, and specific actions and of the whole organization. Moreover, it must enable to meet all administrative needs and justification actions, elaboration of reports, etc.

- Transferable: Despite having been designed for a specific organization, the accumulated own experience and that of other European research groups allows us to introduce the necessary elements to consider transfer to other kind of organizations. Even as regards the contents, all the organizations that have experimented similar systems work jointly on the harmonization of these contents.

### **6.3.3.2. Elements of the Geysa System**

As an instrument of collecting all necessary information for the automatic preparation of periodical and non periodical reports, users' individual and family monitoring, evaluation of the different programmes of the organization, and the evaluation of the organization's general activity, a single document is more appropriate in order to avoid dispersion in data collection and to make its subsequent use easier.

The traditional way of data collection, with fixed compartments materialized in collecting forms and different levels in its computer treatment, make comprehensive monitoring and evaluations more difficult. The philosophy of the instruments to be developed is materialized in a single computer document and a single dossier. This simplifies and speeds up both the gathering and treatment of the information and its enquiry.

**Chart: Geysa. Data Collection.**

Source: Self-elaboration.

As a result, the Geysa system data collection instrument is the user individual dossier, which is the key element of the system:

- Harmonized Observation Guide or Dossier of data collection, which is just the individual dossier of the organization's user.

So the user's individual dossier is the basis of the whole data collection system, articulated around it, for the bureaucratic and administrative monitoring of all the organization's activity. Likewise, it determines the possibilities on the medium and long terms of following up the users' itineraries and, in turn, the information gathered through it must allow the monitoring and evaluation of the association's activity.

The aim of our work on the guide has been to obtain a final document that meets all the organization's needs over a long time with no more modifications than those concerning the organization's evolution itself. The guide has seven sections differentiated from each other by the content of the gathered data:

- I. User's identification and general data and characteristics of the family unit.
- II. Request.
- III. Health data.
- IV. Legal data.
- V. Education.

VI. Labour status.

VII. Current situation in the network.

The main characteristic of the software is its flexibility with regard to the individual dossier. This allows its adaptation to any modification with no need of modifying the structural elements of the system<sup>3</sup>.

The application allows obtaining and making in real time a basic treatment of the collected data in the system. It also enables to export the data selected for specific analyses into a spreadsheet. Likewise, to conduct the data qualitative analyses and obtain typologies, the system considers the possibility of outputting the data prepared for the use of the tools developed from MTI@SHS for the Catalyse set:

- The Anaconda application, developed by J. J. Girardot, which makes the necessary treatments for the performance of the Correspondence Factorial Analysis (CFA), and the Hierarchical Ascending Classification, statistical methods which enable to prove the global tendencies of a target group of individuals.

- The Nuage application. This tool represents the results of both CFA and Hierarchical Classification in three dimensions. This representation system allows for a relatively easy and intuitive interpretation of the whole data.

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<sup>3</sup> The software programming works have been carried out by computer experts from the Local Employment Observatory of the University of Huelva and the Centre for Social and Labour Inclusion Valdocco.

## ***CONCLUSION***

These guidance notes, completed with the complementary deliverables n° 52, 53, 54 and 55, will now permit carrying out the CATALYSE Toolkit and its guidelines, that was the main objective of the work package 6 “TOOLS” in 2006.

We have a first version of the European Guide of Diagnosis and Evaluation. Its contents were discussed among CAENTI participants and their partners in observatories. The meanings of the topics, questions and modalities of the guide are defined. They surely need to be more discussed about the national and regional specificities, but we can consider we dispose of good foundations for this discussion (in part 3 of this deliverable).

This guide will evolve. All the guides in CATALYSE observatories regularly change, each year at the beginning. The observatories have a protocol to plan the changes of the guide. The protocols of guide changes will be one element of the guidelines.

The guide will also evolve with its experiment. We took the opportunity to organize an important experiment with the “migrants” guide, which contains the most parts of the European guide questions. ACCEM is not working on the problems encountered concerning the good understanding of questions and modalities of the guide by end users. They will organize discussion groups on this topic.

To enlarge experiments, we have to translate the guide in professional versions in end users' languages. The University of HUELVA will edit it in English and Spanish, and the University of LIEGE will do it in French. We will do further translations in other languages but they are not planned yet.

The contents of the services repertory were also selected (deliverable n° 52). An important part is based on the guide contents to prepare comparison between needs and services. We now need to complete the definition for the other special information.

The territorial indicators were selected too (deliverable n° 53) from a selection of the guide questions. We thought this task would be easier because the selection of the guide questions takes care of European standards. Nevertheless, the difficulty results to the necessity to confront the indicators at a local level, which depends on the accessibility of the territorial indicators at this level. The group wp4i, in charge of territorial indicators, studied this accessibility (deliverable n° 53). The work package 6 and the group wp4i began to examine in detail the accessibility of European and of compatibles national or regional

indicators at territorial level before achieving the selection and the gathering of indicator's meanings.

A great work was done about the CATALYSE tools of data collection, data analysis and editing.

One part of the research on conceptual and methodological specifications, to put on-line the guide as an “Inclusion Itinerary Accompaniment File” in 2007, then design and make a specialized portal on European institutional indicators that are useful for actors in 2008, are done with the concept of Community System of Territorial Intelligence (deliverable n° 55). This concept permits jointly designing

- The integration of data analysis and spatial analysis tools;
- The integration of the data analysis and processing protocols in a logical chain;
- The integration of all information and documents, collected ones and those the cooperative work produced, from collection to edition, through all the steps of data processing and cooperative work, in a coherent documentary and editing chain;
- According to the governance and the social uses of the community, particularly the organization and the animation of the partnership.

The group wp6p defined the conceptual, methodological and technical specifications of PRAGMA, and more globally for data collecting, coding and analyzing functions, with two options: a standalone multiplatform version and an on line version. In every case, these functions will be work out with free tools and will be free tools (deliverable n° 54).

Within this general framework WP6 carried out data collecting tools:

- A “collect” version of the current version of PRAGMA, without questionnaire management and data analysis functions, in Spanish, for the “migrants” guide. It will be quickly available in English with the European guide and, if needed for experiments in other languages.
- An on line prototype of the data collecting part of PRAGMA, which will be documented.

Wp6p also began computing specifications for:

- A “collect” standalone multiplatform and multilanguage version of PRAGMA;

- A data quantitative analysis standalone multiplatform and multilanguage version of PRAGMA, with questionnaire editing functions;
- An on line data collecting multilanguage version of PRAGMA, with access rights adapted to the specificities of partnerships.

These versions will be carried out jointly in 2007 because we want they can work jointly in order to feed a same database. The computing specifications for a complete standalone multiplatform and multilanguage version will be drawn in order to carry out a first version in 2007 and to integrate it with ANACONDA and NUAGE.

Wp6p precised the technical specifications for integration of PRAGMA with the software of qualitative data analysis ANACONDA and NUAGE (deliverable n° 55). A first step will be done with the integration of ANACONDA and NUAGE in a multiplatform and multilanguage version.

The technical specifications completed the contents specifications of a services repertory for CATALYSE Toolkit (deliverable n°52). The services repertory will be carry out from theses specifications.

From specifications about services repertory, wp6p also started a research concerning the implementation of a CATALYSE observatory website with a popular content management system (CMS). In the entire surveyed observatory, the services repertory was the first Internet service offered by the observatory. The repertory needed the development of a minimal website to be put on line. After that, the observatory used this website to add some information services as news, agenda, results of diagnosis, activities of workshops, etc. Some years ago, it was necessary to code such product, with poor possibility for the users to actualize data. It is currently possible to make the same product, at a generic level, with a content management software. The user just needs to add graphics and contents. He can easily manage the contents, as with a personal blog. WP6 project to do such a CATALYSE web site, including the services repertory inside.

The services repertory could also be later part of the CSTI.

The methodological technical specifications of a Territorial Information System are also given (part four of this report). They are free tools useful to draw maps and to do spatial analysis. They could be easily integrated in the CSTI thanks to data analysis tools. For this tool, the specifications are close to the guidelines.

The wp6g group also did an important work of gathering information about the uses of CATALYSE tools to define data analysis protocols. It also aimed at defining some recommendations for new users who want to implement CATALYSE tools. Wp6 summarized the data analysis protocols of the guide, question by question (part five of this report). Due to the specificities of the practices, they presently are proposals in discussion to define more precisely the coding and the recoding. The analysis of the data of ACCEM migrants guide in six observatories, and the synthesis into a unique protocol will also enrich the data analysis protocol of the European guide. We will further precise the data analysis protocols of the repertory and territorial indicators contents.

The gathering of experiences, uses and practices was very useful to enforce the coordination work within CAENTI because it improved the knowledge about the observatories in CAENTI. These exchanges showed the actors have common topics and histories. The exchanges about the uses permit precisising basic elements of the CATALYSE governance concerning principally the management and animation of the development partnership (section 1.2 of this report). Wp6g established a list of diagnosis, evaluations, observatories and development partnerships using CATALYSE method in Europe (section 1.3 of this report). This list will be completed by a documentary survey to precise the dates, the volume and characteristics of the data, the documents and analysis results, the type of publics, in order to draw a map with the main types of publics and to constitute a database.

Wp6g presented five CATALYSE observatories more three detailed observation mechanisms (part 5 and 6 of this report). OPTIMA and INTEGRA have begun a joined comparative history of their experiences. It will be the base for comparative research aiming to give the importance of the management and the communication in the implementation of CATALYSE in a partnership and to release recommendations for new users.

The technical specifications for the tools of the CATALYSE Toolkit are now given, as we planned. Tools exist presently: PRAGMA collect version, complete PRAGMA version for data analysis, ANACONDA, NUAGE, on line services repertory and Territorial Information System. We began to develop more accessible versions, free, multiplatform and multilanguage. The carrying out of the tools of the CATALYSE Toolkit is coordinated by the Université de Franche-Comté.

In the next future, we will write the guidelines. The definitions for the guide are given. Those of the repertory and territorial indicators must be completed. We gather from the observatories the guidelines for tools.

The experiment of six territorial diagnoses with the “migrants” guide in Spain will be very useful to achieve the technical guidelines. It was an excellent opportunity due to the fast development of migrants CATALYSE observatories supported by ACCEM [FERNANDEZ, 2006]. As this experiment is done within a network of six migration observatories in Spain, three experienced ones, GIGON, SIGUENZA and GUADALARAJA, and three new ones, OVIEDO, SEVILLA and LEON. As the migrants guide included an important set of indicators of the European guide, it was an indirect experience of the European guide. We can study in the same time:

- The understanding of the contents by the end users and how to create a common language at this basic level as the first condition to improve data quality;
- The use of the tools by end users with poor computer skills;
- The quality of the data collection;
- The data analysis according to local and national levels;
- The use of the tool in the frameworks of local partnership and national red.

ACCEM and the University of HUELA, with the help of VALDOCCO, will be in charge to animate, starting from these guidance notes and from this experience:

- Guidelines for the contents evolution;
- The complete definition of the meaning of the contents;
- The guidelines of the data analysis tools;
- The data analysis protocols.

The University of Liege, OPTIMA and INTEGRA, starting from the joint recommendations of OPTIMA and INTERGRA, will be in charge to animate the writing of the recommendation for use.

The observatories of ACCEM, OPTIMA, INTEGRA, ADAPEI and VALDOCCO will be closely associated with the comparative research which will lead to these guidelines of the CATALYSE Toolkit.

We also prepared, and sometime began to experiment on line versions, and the design of an integrated system. WP6 will continue, as planned for 2007 and 2008, a prospective research about an on line version of CATALYSE tools. This research activity is presently well engaged.

In 2007, the research coordination group Wp6d will meet a close staff of researcher and engineers to design the data processing tools. ACCEM, ADAPEI and COCAGNE, which are actors experienced in on line tools, will be associated with this research, about contents and uses. These guidance notes contain numerous elements about on line tools.

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