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D3.1: Standardised quality  
assessment criteria  
and output evaluation  
plans for all WPs

Nature: Report  
Dissemination level: Public (PU)



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the Health Programme  
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## D3.1 description

Description of the deliverable D3.1	
<b>Lead Beneficiary</b>	Medizinische Hochschule Hannover (MHH) as WP lead Robert Gordon University (RGU) as deliverable lead
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# 1 Objectives

The objectives relating to this deliverable are:

1. To develop communications channels between WP3 and WP leads;
2. To develop an internal reporting system for WP tasks, activities, progress with milestones and deliverables, and high quality achievements;
3. To define specific evaluation measures of timeliness, nature and quality tailored to each WP task, milestone and deliverable;
4. To develop the evaluation monitoring process.

## 2 Methods

In-depth discussions between WP3 partners, the overall project lead and KITE took place in relation to each of the objectives. The communication channel was discussed at the consortium meeting in June 2015 in Edinburgh and on further consortium conference calls. Draft versions of the internal reporting templates were developed and refined following feedback from WP3 partners, the overall project lead and KITE. Specific evaluation outcome measures were drafted for each WP task and sub-task. Where possible accepted measures were adopted and adapted – e.g. the PRISMA statements for Preferred Reporting Items for Systematic Reviews and Meta-Analyses in WP6. These draft measures were refined following feedback from each WP partner. The evaluation monitoring process suggested was agreed at a conference call of the WP leads.

## 3 Results

The results related to each objective are:

### Objective 1- communications channels

A member of the WP3 team will be included in all WP conference calls and communications, as well as consortium calls. Further contact will take place via email and telephone as required.

### Objective 2 - internal reporting system

A three-monthly reporting template has been developed and is available on Sharepoint. The three monthly activity reports contains:

1. A management overview;
2. A description of the progress towards the scientific and technological objectives;
3. The identification of the problems and suggested corrective action to be taken;
4. Progress towards publication.

There are 2 sections to the report. Section A is to be completed by WP leads only who will report on their WP. Section B is to be completed by all partner organisations (one report per partner organisation only). All partners will provide brief details of activities across all WPs and tasks they are involved in. The form needs to be completed and returned no more than one week after the end of the reporting period. WP3 will consolidate the information provided into a summary report which will be distributed to all partners and uploaded to SharePoint. The reporting template is given in Appendix 1.

For the first quarter reporting period, all partners completed their template and emailed to RGU where these were refined and collated into one document which was loaded onto Sharepoint. In future, each partner will be sent a WP specific template listing all tasks active during the reporting period. However, they will be asked to report progress with all milestones and deliverables.

### Objective 3 - specific evaluation measures

Detailed measures of timeliness, nature and quality have been developed and agreed for all WPs other than WP1 (which is the general management and monitored through other modes) and WP5 (where the criteria are in draft form pending further WP5 discussions). These criteria are set at the sub-task level to allow in-depth evaluation of progress, which provides an early warning detection system for the tasks being completed, the milestones met and the deliverables being within time and of high quality. The evaluation criteria for each WP are available on Sharepoint and are given in Appendix 2.

### Objective 4 - evaluation monitoring process

Evaluation will be regular and ongoing. One member of the WP3- team with the relevant methodological expertise has been assigned to each WP. That member will be included in all WP conference calls with further contact with the WP lead if required. The evaluation report will be updated regularly on Sharepoint in terms of the criteria of timeliness, nature and quality. Any issues will be highlighted, discussed with the WP lead and contingency measures identified. These will be shared with the project lead, KITE and other members of the consortium if required.

The following standard operating procedure will be employed for each deliverable.

1. Before the due date the appointed evaluator for WP3 will contact the WP Leader to determine the status of the deliverable for progress update and provide a timescale for completion;
2. At least 4 weeks before due date of deliverable the WP leader reports status of deliverable and provides material, results etc;
3. At least 3 weeks before due date evaluation team give written feedback to WP leader (together with coordinator) according the predefined evaluation criteria
4. At least 2 weeks before the due date if evaluation criteria are not met WP leader has to propose and agree changes with the evaluation team in order to meet the evaluation criteria;
5. At least 1 week before the due date WP leader provides final version of deliverable;
6. Evaluation team and coordinator approve the final version before the deadline;
7. The Project Management Office submit the deliverable in the Participant Portal.



## Appendix 1 Reporting template

### SIMPATY Partner Quarterly Report

<b>Partner Organization</b>	
<b>Reporting Period</b>	
<b>Completed by</b>	
<b>Date of Completion</b>	
<p>Return the completed report to:</p> <p>wiese.birgitt@mh-hannover.de d.stewart@rgu.ac.uk k.m.maclure@rgu.ac.uk</p> <p><b>Deadline:</b></p>	

### SECTION A to be completed by Work Package Leads only

#### 1. TASKS

Please complete for each task which has been current during this reporting period

WP Number					
Task Number	Planned Start		Planned End		
	Actual Start		Actual End		
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					

Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					
Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					
Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					
Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					

Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made) <b>(100 words max)</b>					
Task Number		Planned Start		Planned End	
		Actual Start		Actual End	
Task Title					
Summary of Activity (including all notable results, progress and decisions made)					

**2. DEVIATIONS AND CORRECTIVE ACTIONS**

For each significant deviation, please describe proposed corrective actions

Deviations <b>(100 words max)</b>	Proposed corrective actions <b>(100 words max)</b>

## 2. MILESTONES

Please complete for each milestone

Number	Milestone Title	Due Date	Status

## 3. DELIVERABLES

Please complete for each deliverable

Number	Deliverable Title	Due Date	Status

**SECTION B to be completed by all partner organisations**

### 1. TASKS

Please complete for each WP and task you have contributed to during this reporting period

WP Number	Task Number	Summary of activity ( <b>100 words max for each task</b> )

## 2. SIGNIFICANT ACHIEVEMENTS

Please provide a high level summary of significant achievements which can be publically disseminated – good news stories, publications, etc, that can be highlighted to CHAFEA

Date	Description (100 words max)

## Appendix 2 WP Evaluation Criteria

### SIMPATHY EVALUATION REPORTS

<b>WORK PACKAGE:</b> 2		<b>LEAD PARTNER:</b> UOC	<b>EVALUATOR:</b> RGU (K MacLure)
<b>Dissemination of the Project</b>			
<b>Months 1-24 (June 2015 - May 2017)</b>			
<b>MS24</b> SIMPATHY project flyers produced and distributed M2 (31 July 2015)	Actual completion date (dd/mm/yyyy)___/___/___		
Evaluator comments			
<b>TASKS</b>			
<b>TASK 2.1:</b> Target stakeholder database (June 2015 - January 2017)			
<b>Sub-task a:</b> define categories for database; 15 June 2015			
<b>Timeliness</b>			
Evaluator comments			
<b>Nature and quality</b>			
Criteria description	Categories defined with coverage for geography and stakeholders appropriate for WPs		
Evaluator comments			
<b>Sub-task b:</b> input from partners; 30 June 2015			

<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Partners invited to populate database Partners respond with given timescales with completed databases, completing all information required A minimum of 10 individuals from each category with local, national and international coverage to a minimum of 60 stakeholders per partner UOC to complete the database (as above) for non-partner countries across EU
Evaluator comments	
<b>Sub-task c:</b> Refined and maintained every 3 months; 31 July 2015; 31 October 2015; 31 January 2016; 30 April 2016; 31 July 2016; 31 October 2016; 31 January 2017; 30 April 2017;	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Database submission merged, cleaned and checked Partners invited to update and submit every 3 months
Evaluator comments	
<b>MS4</b> First (and subsequent) version(s) consolidated database <b>(duplicate these rows as</b>	Actual completion date (dd/mm/yyyy) __/__/__



<b>required)</b>	
<b>TASK 2.2: Drive traffic to website and repository (October 2015 - January 2017)</b>	
<b>Sub-task a:</b> Design website; 31 October 2015	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	W3C accessibility compliant: fonts, colours, language, alternative text/tags Metadata and analytics evidence hit rates per page, downloads and geographic spread
Evaluator comments	
<b>Sub-task b:</b> Content from all WPs; 31 October 2015 and end of each following month	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Currency, completeness, cohesion: key messages, news stories, events, opportunities for participation and engagement Metadata and analytics evidence hit rates per page, downloads and geographic spread
Evaluator comments	

<b>Sub-task c: Social media; 31 October 2015</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Comprehensive plan of engagement (Facebook and Twitter) Metadata and analytics evidence hit rates per page, downloads and geographic spread
Evaluator comments	
<b>Sub-task d: Repository of dissemination resources; 31 October 2015</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Structured data organisation Metadata and analytics evidence hit rates per page, downloads and geographic spread
Evaluator comments	
<b>TASK 2.3: Case study flyers (November 2015 - May 2016)</b> <b>Flyers describing the project aims, objectives and partners prepared and distributed to stakeholders</b>	
<b>Sub-task a-d: Selection from WP4 case studies, draft flyer, feedback invited from partners, finalised, distributed; 31 May 2016</b>	
<b><i>Timeliness</i></b>	

Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Case study selection strategy Flyer design meets best standards (SIMPATHY branding, plain language, font style, font size, colour, length and ease of use)
Evaluator comments	
<b>MS5</b> Case study flyers	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 2.4: Public Events (June 2016 - May 2017)</b>	
<b>Sub-task a-d:</b> Call for ideas from partners, collation and selection from options, draft, finalise and deliver programme of target-group specific events, report on proceedings	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Planning strategy Accessibility across all target-groups Relevance to SIMPATHY aims and objectives Range of: open events in public spaces, international events, activities focused on IDOP (1 October 2016) Write summary report of proceedings
Evaluator comments	

<b>MS7</b> Presence at IDOP	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 2.5: Organization of SIMPATY workshops (June 2016 - May 2017)</b>	
<b>Sub-task a:</b> development and delivery of workshop template based on case studies, best practices and recommendations targeting EIP-AHA 2016, EPHAR	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Planning strategy Drafting and submission of workshop abstracts incorporating comments from partners Acceptance for conferences and professional/scientific meetings including EIP-AHA 2016, EPHAR Write summary report of proceedings
Evaluator comments	
<b>MS6</b> Parallel SIMPATY workshop at EIP-AHA annual conference	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 2.6: High-level (invitation only) conference organization (June 2016 - May 2017)</b>	
<b>Sub-task a-d:</b> planning, organising, delivery and reporting of high-level conference in Brussels towards end of project	
<b>Timeliness</b>	

Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Planning strategy including organisational and scientific committees Engage event planning organisation Booking of venue, speakers, catering, exhibitors Development and publicising of event programme Target stakeholders including MEPs, politician, policy makers, representatives from European Association of Pharmacists representatives, European Group of Medical Doctors, Nursing Write summary report of proceedings Evidence by memorandum of understanding, emails, letters</p>
Evaluator comments	
<b>MS8</b> Commitment to taskforce by policymakers	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 2.7: Publications (June 2016 - May 2017)</b>	
<b>Sub-task a:</b> dissemination strategy	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Journals to target Multi-media awareness raising materials to empower patients and care providers Strategic documents to drive change, health policies and regulations also health</p>

	professional curricula Layman version for final report
Evaluator comments	
<b>MS8</b> Layman version for final report	Actual completion date (dd/mm/yyyy) __/__/__
<b>TASK 2.8: Production of a reference book on Innovation in Management of Polypharmacy in the EU (January 2016 - April 2017)</b>	
<b>Sub-task a-e:</b> Create a reference book: book planning, call for chapters, chapter collection, chapter revision, book printing	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Reference book should reflect SIMPATHY project: concept, achievements, conclusions, recommendations Published as: e-book on SIMPATHY website and hardcopy for distribution at conference (Task 2.6)
Evaluator comments	
<b>DELIVERABLES</b>	
<b>D2.1 SIMPATHY leaflet (M2, July 2015)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	

Submission date	
Evaluator comments	
<b>D2.2 Reference Book (M22, April 2017)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>D2.3 Report on high-level conference and IDOP (M24, May 2017)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	

## SIMPATY EVALUATION REPORTS

<b>WORK PACKAGE:</b> <b>3</b>	<b>LEAD PARTNER:</b> <b>MHH</b>	<b>EVALUATOR:</b> <b>RGU</b>
<b>Evaluation of the project</b>		
<b>Months 1-24 (1 June 2015 – 31 May 2017)</b>		
<b>TASKS</b>		
<b>TASK 3.1: Development of the protocol for progress evaluation and reporting (30 June 2015)</b>		
<i><b>Timeliness</b></i>		
Evaluator comments		
<i><b>Nature and quality</b></i>		
Criteria description	Specific outcomes, deliverables and milestones with performance and quality metrics for agreement by the consortium at the 1 <sup>st</sup> consortium meeting. Development, maintenance and communication of project calendar including target dates and all workshops dates, subjects, locations and purposes.	
Evaluator comments		
<b>MS9</b> Agreement of consortium on monitoring and internal reporting process	Actual completion date (dd/mm/yyyy)___/___/___	
<b>TASK 3.2: Measures of timeless, nature and quality defined and aligned to each WP output (1 June 2015 – 31 May 2017)</b>		
<i><b>Timeliness</b></i>		



Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Monitoring and chasing progress. Maintaining a risk register of all risks to the full and high quality achievement of SIMPATY objectives, deliverables and milestones. Reporting on overall progress to the consortium at consortium meetings, providing specific feedback to WP leaders and partners where further work or effort is necessary to stay on track or meet quality requirements.
Evaluator comments	
<b>MS10</b> Internal reports compiled and consolidated and disseminated	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 3.3: Methodological evaluation of each outcome/impact indicator (1 July 2015 – 31 May 2017)</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Review and critical analysis of all submitted reports and deliverables against the terms and descriptions in the Description of Work and the Grant Agreement. Feedback will be provided to the involved partners. Submission of quality assessed deliverables to the coordinator for transmission to the EU project officer.
Evaluator comments	

<b>MS11</b> All deliverables submitted to month 12 accepted	Actual completion date (dd/mm/yyyy)___/___/___
<b>Evaluator comments</b>	
<b>MS12</b> All deliverables submitted to month 24 accepted	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 3.4: Validation of recommendations and policy by Delphi study (1 December 2016 – 28 February 2017)</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	A European expert panel will be composed of 5 from each EU country (with accountability and responsibility): 1 policymaker, 2 healthcare commissioners, 1 healthcare provider at director level, 1 clinician (physician or pharmacist) who will participate. Rounds of data collection, quantifying levels of agreement with a series of statements relating to the SIMPATY findings contextualisation and operationalisability. Report of findings.
Evaluator comments	
<b>DELIVERABLES</b>	
<b>D3.1 Standardised quality assessment criteria and output evaluation plans for all WPs (M4, 30 September 2015)</b>	
Evaluator comments	

Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>D3.2 Report on results of Delphi validation study (M21, 28 February 2017)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	

## SIMPATY EVALUATION REPORTS

<b>WORK PACKAGE:</b> <b>4</b>	<b>LEAD PARTNER:</b> <b>FCRB</b>	<b>EVALUATOR:</b> <b>MHH</b>
<b>Case studies</b>		
<b>Months 1-14 (1 June 2015 – 31 July 2016)</b>		
<b>TASKS</b>		
<b>TASK 4.1: Methodology for the case studies (1 June – 31 August 2015)</b>		
<b>Sub-task a:</b> establish the methods that will guide the case study investigation in each of the sites; 15 June 2015		
<b><i>Timeliness</i></b>		
Evaluator comments		
<b><i>Nature and quality</i></b>		
Criteria description	Key documents identified: global assessment, institutional level, external influences Draft outline submitted to selected experts for feedback Consider intervention: location and practice site, population targeted, professionals involved, services provided, intensity of the intervention Consider implementation aspects: challenges, facilitating factors, future plans Consider impact: monitoring, evaluation	
Evaluator comments		
<b>Sub-task b:</b> Provide a framework for the interpretation of the observed results; 31 August 2015		
<b><i>Timeliness</i></b>		
Evaluator comments		

<b><i>Nature and quality</i></b>	
Criteria description	Interviews with experts to validate themes completed: depth of information, identify gaps from desk review, additional information on change management strategies and organisational characteristics influencing program Full draft of handbook including: stakeholder inclusion criteria, structured interview guide, interpretation framework circulated for comment, focus group guide (numbers of and in, settings, moderator guidelines, discussion guide) Final handbook circulated to partners
Evaluator comments	
<b>MS30</b> Handbook on the methodology to be used in the case studies circulated to partners	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 4.2: Conducting the case studies at each of the sites (1 September 2015 – 31 May 2016)</b>	
<b>Sub-task a:</b> progress report to WP3; 30 September 2015	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Case studies initiated at all sites based on selection criteria for representative institution Capture depth and breadth of program Consider contextual factors, facilitators, barriers which may impact on case study Contingency plans
Evaluator comments	

<p><b>MS13</b> Case study work initiated by all partners</p>	<p>Actual completion date (dd/mm/yyyy)___/___/___</p>
<p><b>Sub-task b:</b> comprehensive description of case studies completed; 15 October 2015</p>	
<p><b>Timeliness</b></p>	
<p>Evaluator comments</p>	
<p><b>Nature and quality</b></p>	
<p>Criteria description</p>	<p>Handbook guidance followed including reporting style sheet Framework applied appropriately by all case study sites for standardised reporting Comprehensive reporting of (delays in) progress to date</p>
<p>Evaluator comments</p>	
<p><b>Sub-task c:</b> Preliminary findings compiled; 1 November 2015</p>	
<p><b>Timeliness</b></p>	
<p>Evaluator comments</p>	
<p><b>Nature and quality</b></p>	
<p>Criteria description</p>	<p>Synthesis mapping commonalities across case studies Differences and contextual factors explored and explained Describe factors affecting implementation both facilitators and barriers, examples of best practice, what works well and why</p>
<p>Evaluator comments</p>	

<b>Sub-task d:</b> Interviews with stakeholders completed; 30 November 2015	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Interview guidance applied Accuracy of transcription verified Handling of missing data/recordings/withdrawals Contingency for delays in interviewing
Evaluator comments	
<b>Sub-task e:</b> interim case study report sent to WP6; 31 December 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Completeness in coverage of reporting all aspects as per Case Study Handbook Place holders where further findings/discussion to be added including which WP and contingency planning Format and presentation of results appropriate/useful/targeted Draft circulated for comment
Evaluator comments	

<b>MS26</b> Interim case study report	Actual completion date (dd/mm/yyyy)___/___/___
<b>Sub-task f:</b> Case study reports completed, ready for focus groups; 31 January 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Completeness in coverage of reporting all aspects as per Case Study Handbook Incorporation of comments on draft, where appropriate Format and presentation of results appropriate/useful/targeted SIMPATHY branding applied Areas identified for particular attention of focus group
Evaluator comments	
<b>Sub-task g:</b> focus group of stakeholders providing feedback on findings completed; 29 February 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Focus group feedback incorporated, where appropriate Final draft circulated for comment Final draft amended



Evaluator comments	
<b>Sub-task h:</b> Final case study reports incorporating focus group feedback sent to WP4 leader; 31 March 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Standardisation instructions for format followed to aid synthesis Completeness in coverage of reporting all aspects as per Case Study Handbook Incorporation of focus group comments on draft, where appropriate Format and presentation of results appropriate/useful/targeted SIMPATY branding applied
Evaluator comments	
<b>Sub-task i:</b> Reports on case studies compiled; 30 April 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Synthesis of case study reports Reporting style appropriate for target stakeholders Presentation and SIMPATY branding applied

Evaluator comments	
<b>MS27</b> Report on case studies	Actual completion date (dd/mm/yyyy)___/___/___
<b>Sub-task j:</b> meeting workshops and presentations prepared; 15 May 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Materials prepared as a workshop pack for delivery including: learning outcomes, timings, presentation content, multimedia as appropriate but with alternatives, activities for workshop attendees Slide presentation developed in Powerpoint/Prezi Take home materials from workshops and presentations including links to web portal SIMPATHY branding throughout
Evaluator comments	
<b>TASK 4.3: Analysis of polypharmacy and adherence policy at sites (1 April 2016 – 31 July 2016)</b>	
<b>Sub-task a:</b> Adaptation of case studies to website template; 15 June 2016	
<b>Timeliness</b>	
Evaluator comments	

<b>Nature and quality</b>	
Criteria description	Key documents identified: global assessment, institutional level, external influences Draft outline submitted to selected experts for feedback Consider intervention: location and practice site, population targeted, professionals involved, services provided, intensity of the intervention Consider implementation aspects: challenges, facilitating factors, future plans Consider impact: monitoring, evaluation
Evaluator comments	
<b>Sub-task b:</b> submission of case studies to WP2 for publication on the website; 30 June 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Standardised and consistent reporting Full coverage from all partners SIMPATY branding
Evaluator comments	
<b>MS14</b> Case studies available for upload on website	Actual completion date (dd/mm/yyyy)___/___/___
<b>Sub-task c:</b> first draft of analysis across sites completed; 30 June 2016	
<b>Timeliness</b>	

Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Standardised and consistent reporting Full coverage from all partners SIMPATHY branding Circulated for comment
Evaluator comments	
<b>Sub-task d:</b> discussion of draft report amongst consortium members; 8 July 2016	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Report amended to incorporate feedback, where appropriate Standardised and consistent reporting Full coverage from all partners SIMPATHY branding Circulated for final comments
Evaluator comments	
<b>Sub-task e:</b> final report on the analysis of polypharmacy and adherence policies; 31 July 2016	
<b>Timeliness</b>	

Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Standardised and consistent reporting Full coverage from all partners SIMPATHY branding Meets the criteria and expectations set out in the SIMPATHY Grant Agreement
Evaluator comments	
<b>DELIVERABLES</b>	
<b>D4.1 Report on case studies (M11, 30 April 2016)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	

## SIMPATHY EVALUATION REPORTS

<b>WORK PACKAGE:</b> <b>5</b>	<b>LEAD PARTNER:</b> <b>UOP</b>	<b>EVALUATOR:</b> <b>RGU</b>
<b>Policy and change management</b>		
<b>Months 4-18 (1 September 2015 – 30 November 2016)</b>		
<b>TASKS</b>		
<b>TASK 5.1: Mapping change management processes (31 December 2015)</b>		
<b><i>Timeliness</i></b>		
Evaluator comments		
<b><i>Nature and quality</i></b>		
Criteria description	<p>Gathering of case studies, elaboration and assessment of the overall provided data (including current practices) by creating specific socio-economic, epidemiological and health outcomes indicators.</p> <p>The change management process will focus on the evaluation of the overall therapeutic and socio-economic value of medicines based on health economics methods and criteria already used in many countries.</p>	
Evaluator comments		
<b>MS15</b> Agreement of consortium on change management processes	Actual completion date (dd/mm/yyyy)___/___/___	
<b>TASK 5.2: Evaluation of the impact of the change (1 December 2015 – 30 September 2016)</b>		
<b>Subtask a: Model data based on case study evidence</b>		

<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Aligned with secondary outcome measures described in the case study framework as described in WP4 and Section 6 “Sustainability of the EU Healthcare System” the model data will be monetised where possible.</p> <p>These include the number of prescribed drugs; changes in Quality of life measured by EQ-5D; the number of hospitalisations during follow-up-period (unplanned admissions, re-admissions, admissions related to medication, attendances to emergency departments); information about healthcare services use (number of unplanned visits to GP practices, number of out of hour visits); and, broadly, healthcare costs (incl. labour inputs of carrying out the polypharmacy reviews).</p> <p>The data from the benchmark study will be analysed with this model.</p>
Evaluator comments	
<b>Subtask b: Application of change management tools</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>PESTEL analysis will be performed based on scanning the components of strategic management such as all the aspects presented above and detailed in Section 5.</p>

Evaluator comments	
<b>MS16</b> Change management tools available on SIMPATHY website	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 5.3: Evaluation using SWOT analysis tools (1 December 2015 – 30 September 2016)</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Evaluate the strengths, weaknesses, opportunities and threats involved by analysing the polypharmacy situation in each country. SWOT analysis will be performed at both a national and/or regional level to ensure relevance to both policymakers and healthcare practitioners.
Evaluator comments	
<b>TASK 5.4: Model strategic plan for polypharmacy and adherence management (1 September 2016 – 30 November 2016)</b>	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Extract results of PESTEL and SWOT analysis. Integrated approach and involvement of all stakeholders. Common understanding of the challenges and obstacles and routes and techniques.



Evaluator comments	
<b>MS17</b> Model strategic plan published in practitioner journal and available on SIMPATHY website	Actual completion date (dd/mm/yyyy)___/___/___
<b>DELIVERABLES</b>	
<b>D5.1 Model of the change management process for controlling polypharmacy including PESTEL and SWOT analysis tools (M12, 31 May 2016)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>D5.2 Model strategic generalizable plan for intervention in polypharmacy management (M18, 30 November 2016)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	



## SIMPATHY EVALUATION REPORTS

<b>WORK PACKAGE:</b> <b>6</b>	<b>LEAD PARTNER:</b> <b>MUL</b>	<b>EVALUATOR:</b> <b>RGU (D Stewart)</b>
<b>Benchmarking of European strategies of polypharmacy and nonadherence management in elderly</b>		
<b>Months 1-18 (June 2015 - November 2016)</b>		
<b>TASKS</b>		
<b>TASK 6.1: Literature review (June - October 2015)</b>		
<b>Sub-task a:</b> : literature review strategy defined; 15 June 2015		
<b><i>Timeliness</i></b>		
Evaluator comments		
<b><i>Nature and quality</i></b>		
Criteria description	<p>Draft literature review protocol developed and circulated  Comments invited on draft protocol  Finalised protocol to include:  Concise background  Clear aim/objective  Clear inclusion and exclusion criteria (may consider PICO or other format)  Search strategy to include:  Search terms, appropriately detailed  Databases with justification  Years for search  Grey literature  Consider assessment of quality:  Independent reviewers  Process for data extraction:  Independent reviewers  Process of data synthesis</p>	

	Plans for reporting Consider inclusion in PROSPERO
Evaluator comments	
<b>Sub-task b:</b> search strategy approved; 30 June 2015	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Final search strategy with detailed steps which could be replicated Some assessment of quality assessment of search
Evaluator comments	
<b>Sub-task c:</b> literature search database designed; 10 July 2015	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Templates for quality assessment and data extraction developed and piloted At least two independent reviewers, who are trained and competent
Evaluator comments	
<b>Sub-task d:</b> published literature search ready; 31 July 2015	

<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Quality assessment and data extraction completed Data synthesis undertaken
Evaluator comments	
<b>Sub-task e:</b> grey literature search performed; to be agreed in alignment with WP4	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Quality assessment and data extraction completed
Evaluator comments	
<b>Sub-task f:</b> grey literature search coded; to be agreed based on subtask 6.1e	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Data synthesis undertaken

Evaluator comments	
<b>Sub-task g:</b> search analysis ready; 31 October 2015	
<b><i>Timeliness</i></b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Draft literature review report developed and circulated  Comments invited on draft report  Finalised report to include:  Concise background  Clear aim/objective  Clear inclusion and exclusion criteria (may consider PICO or other format)  Search strategy to include:  Search terms, appropriately detailed  Databases with justification  Years for search  Grey literature  Results of search strategy in the form of a PRISMA chart  Consider assessment of quality:  Independent reviewers  Results of quality assessment in form of tables  Process for data extraction:  Independent reviewers  Results of data extraction in form of tables  Process of data synthesis  Detailed narrative synthesis  Plans for dissemination</p>

Evaluator comments	
<b>MS31</b> Literature review report	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 6.2: Survey design and targets (October - January 2016)</b>	
<b>Sub-task a:</b> Benchmarking parameters drafted (31 October 2015)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Domains and items for the survey tool identified from analysis of case studies, change management and literature review in terms of effectiveness, cost-effectiveness, applicability and scalability
Evaluator comments	
<b>Sub-task b:</b> Benchmarking parameters agreed (13 November 2015)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Domains and items finalised and circulated Comments invited on draft survey tool

Evaluator comments	
<b>Sub-task c:</b> Survey questionnaire drafted (18 December 2015)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Draft questionnaire formatted</p> <p>Draft questionnaire tested for face and content validity by a panel of at least ten experts throughout Europe</p> <p>Criterion validity is assumed as derived from earlier work</p> <p>Design meets best standards of presentation for web based questionnaires (plain language, font style, font size, colour, length, and ease of use)</p>
Evaluator comments	
<b>Sub-task d:</b> Survey questionnaire translated into three languages (31 December 2015)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Translated into Greek, Polish and English</p> <p>Approved translators used</p> <p>Back translation performed and checked</p> <p>Invitation letter drafted in three languages as per the questionnaire</p>



Evaluator comments	
<b>Sub-task e:</b> Survey questionnaire piloted (15 January 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Pilot sample and sample size identified (up to 10 stakeholders per country) Online pilot study undertaken, including a test-retest reliability assessment
Evaluator comments	
<b>Sub-task f:</b> Pilot results analysed (27 January 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Analysis strategy defined to include assessment of: Analytics of when and where online questionnaire accessed, submitted Response rate Completion of items Review pilot results and refine for the full study

Evaluator comments	
<b>MS18</b> Benchmarking survey design ready	Actual completion date (dd/mm/yyyy)___/___/___
<b>TASK 6.3: Survey execution (November 2015 - July 2016)</b>	
<b>Sub-task a:</b> Questionnaire translated in ten languages (29 February 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Translated into ten languages (Danish, English, French, German, Greek, Italian, Polish, Portuguese, Spanish, Swedish) Approved translators used, identified by partners Back translation performed and checked Invitation letter drafted in ten languages as per the questionnaire
Evaluator comments	
<b>Sub-task b:</b> Survey enabled in the SM (18 March 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	

Criteria description	Questionnaire published online and tested
Evaluator comments	
<b>Sub-task c:</b> SM survey tested and ready for use (30 March 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	
Evaluator comments	
<b>Sub-task d:</b> Invitation sent to stakeholders (31 March 2016)	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Sampling strategy for the full survey identified Sampling undertaken in 28 member states (from the database in WP2) Invitation email sent linking to the online questionnaire
Evaluator comments	

<b>Sub-task e: Survey performance checked (8 April 2016)</b>	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Record analytics of when and where online questionnaire accessed, submitted Maintain daily record of online submissions of responses
Evaluator comments	
<b>Sub-task f: Interim results analysed and actions taken (31 May 2016)</b>	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	Analysis strategy defined Interim analysis undertaken Interim analysis brief report
Evaluator comments	
<b>MS19</b> Survey fieldwork completed	Actual completion date (dd/mm/yyyy) __/__/__
<b>TASK 6.3: Analysis of results (July 2016 - November 2016)</b>	

<b>Sub-task a: Analysis of the benchmarking survey results (30 September 2016)</b>	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Full analysis according to strategy to include effectiveness, cost-effectiveness, applicability and scalability, different clinical sectors, healthcare settings etc</p> <p>Validity testing of analysis</p> <p>Draft reports developed and circulated for comment</p> <p>Full report of results</p> <p>Full survey report to include abstract, introduction, methods, results, discussion, conclusion, references</p> <p>Summary report</p> <p>Open source publication</p>
Evaluator comments	
<b>Sub-task b: Integration of literature review and benchmarking survey results (30 November 2016)</b>	
<b>Timeliness</b>	
Evaluator comments	
<b><i>Nature and quality</i></b>	
Criteria description	<p>Draft report developed and circulated for comment</p> <p>Report to integrate literature review and benchmarking</p>

Evaluator comments	
<b>MS19</b> Survey fieldwork completed	Actual completion date (dd/mm/yyyy)___/___/___
<b>DELIVERABLES</b>	
<b>D6.1 Literature review report (M5, October 2015)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>D6.2 Benchmarking survey report (M18, October 2016)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	



## SIMPATHY EVALUATION REPORTS

<b>WORK PACKAGE:</b> <b>7</b>	<b>LEAD PARTNER:</b> <b>UOC</b>	<b>EVALUATOR:</b> <b>RGU (K MacLure)</b>
<b>Dissemination of the Project</b>		
<b>TASKS</b>		
<b>TASK 7.1:</b> Establishment of SIMPATHY knowledge sharing portal structure (1 June 2015 to 31 May 2017)		
<b>Sub-task a:</b> designing core elements and structure; 31 August 2015		
<b><i>Timeliness</i></b>		
Evaluator comments		
<b><i>Nature and quality</i></b>		
Criteria description	Structure: ease of navigation, placement and naming of content, language translation button, public and private areas of portal Content management: project description area; consortium presentation area; other partner presentation area; news area; external links Dissemination toolkit (from WP2): advocacy platform, empowerment platform Testing: functionality, W3C accessibility and compliance, performance analytics, currency of content Technical documentation: standard and comprehensiveness of content, presentation	
Evaluator comments		
<b>MS20</b> Approval of pre-launch SIMPATHY web portal design	Actual completion date (dd/mm/yyyy)___/___/___	
<b>TASK 7.2: Establishment, population and maintenance of knowledge sharing portal (September 2015 - May 2017)</b>		



<b>Sub-task a:</b> implementation of structure and navigation, ongoing population of content	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Structure: ease of navigation, placement and naming of content, language translation button, public and private areas of portal Content management: project description area; consortium presentation area; other partner presentation area; news area; external links Dissemination toolkit (from WP2): advocacy platform, empowerment platform Testing: functionality, W3C accessibility and compliance, performance analytics, currency of content
Evaluator comments	
<b>TASK 7.3: Monitoring and analytics (1 October 2015 – 31 May 2017)</b>	
<b>Sub-task a-b:</b> Monthly monitoring and review; quarterly reporting to the consortium	
<b>Timeliness</b>	
Evaluator comments	
<b>Nature and quality</b>	
Criteria description	Collate and review portal structure and content based on: web access rates, areas of access, location of access request

<b>Evaluator comments (NB duplicate rows as required for each reporting period)</b>	
<b>MS21</b> Upload/Download of case studies by all 28 EU countries	Actual completion date (dd/mm/yyyy)___/___/___
<b>MS22</b> Upload/Download of benchmarking survey results by all 28 EU countries	Actual completion date (dd/mm/yyyy)___/___/___
<b>MS??</b> Download of change management tools by EU28	Actual completion date (dd/mm/yyyy)___/___/___
<b>MS23/MS28</b> Interim report/ Final report on portal performance	Actual completion date (dd/mm/yyyy)___/___/___ Actual completion date (dd/mm/yyyy)___/___/___
<b>DELIVERABLES</b>	
<b>D7.1 Website and technical documentation (M3, 31 August 2015)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>D7.2 Public and private areas of web portal (M3 and M5, 31 August and 31 October 2015)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	

Submission date	
Evaluator comments	
<b>D7.3 Final report on web portal performance (M24, May 2017)</b>	
Evaluator comments	
Review by team target date	
Evaluator comments	
Submission date	
Evaluator comments	
<b>IMPACT AND OUTCOME MEASURES</b>	
Criteria description	To be negotiated with WP leader
Evaluator comments	