



Specifications of the contents of the European Guide of Diagnosis and Evaluation.

Celia Sanchez Lopez, Jean-Jacques Girardot

► To cite this version:

Celia Sanchez Lopez, Jean-Jacques Girardot. Specifications of the contents of the European Guide of Diagnosis and Evaluation.. In International Conference of Territorial Intelligence, Sep 2006, Alba Iulia, Romania. Aeternitas, Vol.2, p. 89-111., 2007. <halshs-00523560>

HAL Id: halshs-00523560

<https://halshs.archives-ouvertes.fr/halshs-00523560>

Submitted on 3 Jun 2014

HAL is a multi-disciplinary open access archive for the deposit and dissemination of scientific research documents, whether they are published or not. The documents may come from teaching and research institutions in France or abroad, or from public or private research centers.

L'archive ouverte pluridisciplinaire **HAL**, est destinée au dépôt et à la diffusion de documents scientifiques de niveau recherche, publiés ou non, émanant des établissements d'enseignement et de recherche français ou étrangers, des laboratoires publics ou privés.

***SPECIFICATIONS OF THE CONTENTS OF THE
EUROPEAN GUIDE OF DIAGNOSIS AND EVALUATION***

Celia SANCHEZ LOPEZ

Observatorio Local de Empleo. Universidad de Huelva
celia@ole.uhu.es, Tél: + 34 959 21 94 12

Professional address

Observatorio Local de Empleo - Universidad de Huelva - Campus «El Carmen» - Pabellón 7 - Avenida de las
Fuerzas Armadas s/n – S-21071 HUELVA, Spain.

Jean-Jacques GIRARDOT

Associate professor in Economics
jjg@mti.univ-fcomte.fr, GSM: + 33 (6) 13 33 29 58

Professional address

Maison des Sciences de l'Homme Claude Nicolas LEDOUX
UMR 6049 CNRS/UFC ThéMA
University of Franche-Comté - 32 rue Mégevand - F-25030 BESANÇON cedex, France.

Abstract: This communication evokes the coordination activities that were made within the WP6C group that is in charge of the definition of the CATALYSE toolkit contents. The diagnosis and evaluation guides that have been defined and used by the present CAENTI partners since 1994 were harmonized. The latter wade also made so as to respect the European standards for the concerned data and to facilitate its confrontation with the available indicators at the European level. A series of specifications was defined concerning the functions of this guide (communication instrument/data processing base), its structure (welcome/project/evaluation), the information it includes, and the data processing protocols of this information. The works in progress, of which continuation has now to be organized and planned, are linked to: the precise definition and the contents formulation according to national differences and local practices; the process designs redaction, according to statistical procedures.

Résumé: Cette communication évoque les activités de coordination réalisée par le groupe wp6c qui est responsable de la définition des contenus de la trousse à outils CATALYSE. Dans un premier temps, les guides de diagnostic et d'évaluation qui ont été définis et utilisés par les participants actuels de la CAENTI depuis 1994 ont fait l'objet d'une synthèse pour proposer une sélection d'indicateurs formulés sous forme de questions. Ce sont les informations dont l'intérêt a été reconnu par tous les partenaires. La formulation des questions et de leurs modalités respecte les normes européennes lorsqu'elles existent, afin de faciliter la comparaison avec les indicateurs européens disponibles. Une série de caractéristiques formelles ont été définies au sujet des fonctions et de la structure de ce guide, afin de préparer les étapes suivantes du travail : définition des indicateurs, description de leurs protocoles de traitement et instrumentation.

Keywords: Territorial intelligence, Participation, Indicators, Diagnosis, Evaluation.

Mots-clés: Intelligence territoriale, Participation, Indicateurs, Diagnostic, Evaluation.

SPECIFICATIONS OF THE CONTENTS OF THE EUROPEAN GUIDE OF DIAGNOSIS AND EVALUATION

INTRODUCTION

The guide of diagnosis and evaluation is the basic tool of the CATALYSE method. The latter is presented in the previous communication “Activities and prospects of the WP6 “Tools for actors” of CAENTI”.

As a diagnosis tool, it makes possible to identify the global needs of a person or, by aggregation of individual guides, of a group of people. Then, it allows evaluating if the available services are relevant, i.e. if they are adapted to these needs, then if they are efficient, i.e. if they satisfy these needs and at the lowest cost. The comparison with territorial indicators is useful to evaluate the services impact.

The European guide of diagnosis and evaluation that is presented here results from the cooperative investigation work of the territorial actors and the universities gathered in the CAENTI project, funded by the 6th research framework-programme of the European Union. The objective of this project is to offer to the territorial actors useful tools to understand the complexity and the diversity of the individual situations in order to work out, to manage and to value multi-sectors projects that respect sustainable development.

The first multisector guide of diagnosis and evaluation was designed in 1990 in the framework of the European Model Action “MOSAÏQUE”. It was worked out by actors brought together within a multi sector partnership with the help of researchers of the University of Franche-Comté. This guide aimed at identifying the individual needs through talks led by the actors with the users of which they ensured the accompaniment, in order to work out an individual project of socio-professional insertion. This guide was structured like a questionnaire in order to allow a quick treatment of a set of guides concerning a public of accompanied users. Thus, it also allowed operating a collective diagnosis to identify the main complex profiles of needs and to measure their importance, in order to improve the relevance of the actions led to satisfy these needs. Then, the guide was used to value the efficiency of actions created or renewed after the diagnosis. It also allowed valuating the actions led with a target public by confronting the results obtained at the level of this group with contextual indicators linked to the territory. That is why it was called a “guide”.

In 1994, the MOSAÏQUE guide was used by the University of HUELVA to establish the “Social map of HUELVA”. Thereafter, the Observatory Local of Employment “OLE” used the CATALYSE (new name of the method) guide, into survey a panel of 6000 people in order to follow the trends of the local employment market and of the social condition, each six-month period.

Since 1996, the guide of diagnosis and evaluation was applied by twenty territorial multi-sector partnerships in Europe, linked to different and varied territories and publics. In each place, the partnership worked out and tried out a specific guide because of the disparity of the devices of intervention and of the variety of the representations and practices.

Some of these actors, and the universities, which brought to them their knowledge of the territory and their methodological competences, are the partners of the CAENTI consortium. They offered to operate a synthesis of their experiments, to offer to the actors who want to better know the needs for their users in order to better satisfy them, a European guide of diagnosis and evaluation, gathering the common indicators they usually use.

This contribution constitutes a first proposal, which remains to be debated according to the uses differences. They are basic specifications, which should now be supplemented by definitions and treatments protocols. The latter will be yet instrumented. It is the first step of an harmonization effort, which will result remains to be tested in a second time.

1. OBJECTIVES AND METHODOLOGY OF THE DEFENITION OF THE EUROPEAN GUIDE OF DIAGNOSIS AND EVALUATION

The suggested guide does not aim at constituting a “turn-key” tool.

It is a selection of indicators presented under questions form. It should firstly allow specifying their definition, then determining their treatment protocols, and lastly working out the analysis tools which instrument these protocols. It can evolve in the course of this step.

They are the indicators used by most of the partners that fed the synthesis. Each local partnership

worked out its own multi-sector guide within the framework of the CATALYSE method according to its objectives, to its representations, to its practices, to its institutional environment and to its regional context. However, the underprivileged populations live situations which global dynamics are often close, even if they are locally expressed with a strong diversity. Thus, it was possible to bring closer many indicators and to homogenize their formulation by fixing itself in last authority on the European standards to suggest a European selection that is usable at a local scale. Consequently, it allows making comparisons between territories and in relation with the European indicators. Each local guide did not use all the indicators suggested by the European guide and included specific indicators, which were generally rejected, except when their interest was recognized by most of the other partners.

The European guide CATALYSE contributes to the general orientations of the CATALYSE toolkit, as they were described in the general presentation of the WP6.

The coordination of the selection of the indicators then the formulation of the questions and the methods were the subject of a comparative research animated by Celia SANCHEZ LOPEZ on the co-operative workspace COOSPACE in the framework of a doctoral practice in the Institute of Humanities and Social sciences of the university of Franche-Comté. She animated confrontation of the guides of diagnosis and evaluation CATALYSE used by the actors participating in consortium CAENTI, in various territories from Europe, harmonization of the selected indicators and their comparison with the national devices and the European standards.

This work of synthesis and harmonization led to the selection and the formulation of the indicators of the European guide. The selected questions and modalities are sufficiently generic to facilitate comparisons but they must allow expressing the idiosyncrasy of each territory or action.

At the formulation level, Celia SANCHEZ LOPEZ provided an important work of harmonization with the European standards starting from a study of the official European statistical portals. This work led to a first series of definitions.

As of May 2006, this coordination led to a first proposal of European guide which specifications were presented in a first report "Specifications of the contents of a European Guide of Diagnosis and Evaluation" (Deliverable No 51) published at the end of August 2006.

The debate on the definitions, the treatment protocols and the tools, continued on COOSPACE.

It leads now to a new formulation of the guide, which is attached. It is strongly inspired by the first results of the experimentation of the guide "CATALYSE Migrant" within the observatories of the ACCEM, in particular of technical exploitation constraints. The selection of indicators did not evolve much, but the questions formulation was improved.

2. FUNCTIONS AND STRUCTURE OF THE EUROPEAN GUIDE OF DIAGNOSIS AND EVALUATION

The "CATALYSE" guide has three functions. As its title indicates, it is a tool of diagnosis and evaluation, at the individual and collective level. It is also used as an observation instrument.

It is called "guide" because it is intended to be used within the framework of interviews but it has a structure of questionnaire, in order to facilitate its exploitation and to simplify its use.

2.1. Functions of the guide

The CATALYSE guide was initially designed as an evaluation instrument, within the framework of local projects of social and professional integration. It became a diagnosis tool because of the will to base the evaluation of these collective projects on the satisfaction of the "users'" individual needs of the insertion services.

It firstly allows the user, with the assistance of a foreground actor, within the framework of an individual accompaniment, identifying all its needs and to work out an individual project under the form of activities to be made during a defined period in the framework of available services.

Thus, the guide aims at describing the situation and the needs of a person from a global, multi-sector point of view. It allows this person understanding the whole of his needs and the particular complexity of their association. The usual term of diagnosis does not describe a medical situation where a specialist identifies, with felt symptoms the real mechanisms of a disease to determine a treatment, what the patient cannot do by himself. Here, the "diagnosis" consists in helping the user to identify his needs and to formulate a project to satisfy them.

This project is formulated under the form of a set of activities, which correspond to concrete services, that the user commits to realize in order to satisfy his needs and to improve his autonomy within a defined delay. The concerned services are actions of social and professional integration offered by public or associative actors within the framework of an individualized accompaniment. They can more

generally be public, associative or private services, which contribute to the equitable and sustainable development of a territory and of its community.

Then, the guide can be used to value the carried out activities, the evolution of the user's situation and his satisfaction.

The guide is also used to operate diagnoses and evaluations concerning a group of people or a project at a territory scale.

By aggregating individual guides, it is possible to operate a collective diagnosis of the people who are accompanied within the framework of a service, an action, a device, a project, a program, a structure, a territory, etc.

By confronting the aggregated needs of a population, collected within the framework of accompaniment interviews or by the means of a survey, with the indexed services on a territory, it is also possible to value the relevance of these services, i.e. their good adequacy with the needs. Then, the diagnosis and the evaluation integrate in observation logic.

We can value a project, a structure or a territory efficiency, by studying over a given period the satisfaction of the needs that were initially expressed, the consumed services and the evolution of the people situation.

We can also compare the identified needs by the means of the guide with public contextual indicators about the territory and its population.

These evaluations fall under an observation process.

Lastly, the realization of a periodic diagnosis by using a panel, and the repetition of the diagnosis-evaluation cycle, also constitute the base of the observatories constitution.

2.2. Structure of the guide

The guide of diagnosis and evaluation has two structural characteristics:

1. Despite it is called guide of interview, it appears under the form of a questionnaire that is essentially constituted of closed questions.
2. It includes several parts: identification, reception, project and evaluation.

2.2.1. Guide versus questionnaire

The guide uses indicators to describe situation and the needs for a person according to a global, multi-sector approach. These indicators are filled in at the

time of interviews between the concerned person and the actor(s) who makes its accompaniment. This is why this document is called "guide".

To allow the regrouping of the guides and their data processing exploitation, the indicators are formulated like questions, and the guide is structured like a questionnaire. However, it is not always filled in once like a questionnaire, and the whole of the guides are not filled in a reduced time. It is generally filled in within the framework of an accompaniment at the rhythm of its progression, by means of interviews.

Besides, the new version of the European guide has evolved towards a direct formulation. The actors mainly control their activity sector. They appreciate a precise formulation for the sectors in which they are not specialists. The suggested formulation respects the European standards when there are some. This formulation also allows using the guide like a questionnaire, for example in the case of territorial diagnoses, where the data gathering is not carried out within the framework of accompaniments but of a survey.

The questions are generally formulated under a closed form. If it presents the disadvantage of conditioning the answers according to preset modalities, this form has two advantages: it institutes a common language and it allows a quick, documented and consequently accessible to all statistic processing. The open question allows a personal expression, but it should be coded under the form of modalities to exploit it, what represents a long human work of which the results depend on the operator.

The actor who uses the guide within the framework of accompaniment interviews keeps the control of the questions formulation and the user freely expresses his answers. Then, the closed form lead them to specify the corresponding modality that corresponds to a collective norm, or a European standard, which will facilitate the comparisons later on.

2.2.2. Parts of the guide

The guide includes three sections: identification, diagnosis and evaluation.

Each guide is identified by the means of a code corresponding to the person, by possibly differentiating several interventions. It must be possible to attach it, on the one hand, with an action, a structure and with a reference person to analyze these specific groups and, on the other hand, to geographically refer it in the prospect of the space analyses.

The diagnosis and the evaluation constitute two distinct parts because they intervene at different times. Thus, a guide concerns a diagnosis and the evaluation of the activities that are implemented then.

The experiment shown that the guide of diagnosis and evaluation must include two parts for the diagnosis.

The first one corresponds to a questionnaire of reception and orientation with few general questions, which relate to all the sectors of intervention and which are filled in at the time of a first interview.

The second part guides the design of an individual project. It consists in more detailed questions that allow deepening the needs and which are gathered by topics.

The diagnosis ends with the identification of the activities the person plans to make in an established time period.

The evaluation merely consists in enumerating the activities that were carried out, the evolutions of the situation of the person and his satisfaction, at the end of this period.

2.3. Topics of the guide

The contents of the questionnaire are finally organized in several blocks of questions:

- Identification, project and territorial information
- Reception
- Personal and family data
- Housing
- Health Context
- Autonomy
- Employment
- Evaluation

IDENTIFICATION, PROJECT AND TERRITORIAL INFORMATION

The identification does not concern the questioned person. From this point of view, the guide is anonymous. It is identified by a user code that is only known by a referent actor who coordinates his accompaniment. In theory, the statistical individual is the user, a questionnaire is filled in for each user.

In an observation process, the diagnosis and the evaluation can be regularly repeated, usually once per year. It is possible to dissociate some steps in a person's accompaniment. In this case too, several questionnaires will be filled in for a user, as much as his course includes steps. In all the cases where several questionnaires are filled in for a user, we

will dissociate each intervention or step by a two-number code that corresponds to a number of row. In this case, each intervention constitutes a statistical individual.

This part also identifies the reference structure, the reference action and the referent in order to be able to gather the questionnaires for specific exploitations.

It also identifies the country, the region, the municipality and the district of residence for the cartographic and spatial analyses.

RECEPTION

The guide gathers all the useful topics for a global approach. This block of questions gathers a first choice of the descriptive questions, one or two per topic. It can be easily completed during a first reception interview. It is a photography concerning the main interventions sectors which, on the one hand, characterize the individual at the time of the first visit and, on the one hand, quickly identify the outlines of the most suitable accompaniment. Thus, it allows an orientation towards a referent in accordance with the main needs of the user.

The following questions are related to the needs diagnosis and to the expression of the individual project. They are presented according to topics corresponding to the main intervention sectors .

PERSONAL AND FAMILY DATA

This block firstly picks up the individual's characteristic data: gender, age, way of life, individual position in the household and formation . These indicators have been standardized following the indications of some European surveys about the populations and the social conditions.

The information linked to the characteristics of the household: structure of the household; dependent people in the household; amount and source of the income. The indicators were selected by considering the need of information that were expressed by the territorial actors. They were standardized with the definitions included in the surveys on the the work force of the National Labor Force Surveys and the European Income and Living Conditions survey (which substitutes PHOGUE).

HOUSING

This bloc concerns the information about the characteristics of the housing and the difficulties for its access and maintenance.

These indicators were standardized following the indications of the European surveys about the incomes and the living conditions, European Income and living Conditions and the Statistical Community Information. DOCE of 3rd of July of 2003 L165 and DOCE of 12th of November of 2003 L298.

The mobility is also evoked in this block as it expressly and exclusively refers to the residential mobility. These indicators were standardized after the national censuses (National Population's censuses) and the survey on the work forces (Labor Force Survey). These surveys include information about the population mobility, from its residence place to its working place.

HEALTH CONTEXT

This block informs about health problems and illnesses that a person can suffer from, as well as on the difficulties he faces because of the exercise of the daily activities. These indicators were standardized after the indications of the European Health Interview Surveys (HIS).

INDIVIDUAL AND SOCIAL AUTONOMY

These questions give information on the mobility of the individual as regards its daily moves, on its ability to communicate with the others, in particular in the case of the migrants. It is basically based on the indicators included in the guides of the CAENTI territorial actors because there are no European references on this topic.

It includes indicators on the degree of participation of each individual in the activities that are organized in his close environment.

Two questions concern the use of the information technologies and of Internet. The European references come from the Statistics Bureau of European Union.

EMPLOYMENT

This topic concerns the situation of the individual as regards employment, including the situations of unemployment and inactivity. These indicators were standardized at the European level with the

investigation about the labor forces. The national studies have the best level of homogenization in the European Union. Then, they were updated according to the definitions established by the International Labor Organization within the framework of the XIIIth International Conference of Labor Statisticians.

PROJECT

The previous topics allow identifying the needs of the user and lead to work out a project to satisfy them. It is simply expressed in the guide by a list of activities the user commits to carry out during an established lapse of time.

EVALUATION

This block suggests three questions, which relate to the used services, the objective changes in the personal situation of the user and his satisfaction. He can complete its answers by open remarks.

3. Contents of the guide

The European questionnaire finally gathers 105 questions intended to constitute a four to six-page document according to the language. The following version is a document of work which was not page set.

See the Guide at the end of the paper.

This selection of indicators constitutes a first proposal. It is not an immutable unit. It should still move in the short term with the treatment protocols and their instrumentation.

It will evolve in the longer term according to the changes that affect the people's situations and to the intervention programs. Specifications will specify a protocol of harmonious evolution allowing a real follow-up in time and limiting the data loss.

CONCLUSION

The European guide results from an important participation of the CAENTI territorial actors and universities. It is a common denominator of the territorial guides that are used by the actors in the framework of diagnoses, evaluations or local observations. It does not result from a global analysis, even if the researchers' intervention and the confrontation with the European norms contributed to introduce this point of view.

Each actor has information needs that are different from the other ones', according to his context, his approach, his experiment and his personality. That is why the drafting of the guide required a complex participative and cooperative process, between the

actors, between the actors and the researchers and with the researchers who study the territory from a more academic analytic perspective.

A consensus has been reached by all the actors and researchers about a first proposal of European guide CATALYSE. It is an indispensable base of work that remains evolutionary, because it will allow continuing the work of definition of each indicator meaning we initiated, as well as the comparative thinking about the treatment protocols and the instrumentations we started.

BIBLIOGRAPHY

DIARIO OFICIAL DE LA UNIÓN EUROPEA, Reglamento (CE) No 1177/2003 del Parlamento Europeo y del Consejo de 16 de junio de 2003 relativo a las estadísticas comunitarias sobre renta y condiciones de vida (EU-SILC), 3 de julio de 2003, L165.

DIARIO OFICIAL DE LA UNIÓN EUROPEA, Reglamento (CE) No 1980/2003 de la Comisión de 21 de octubre de 2003 por el que se aplica el Reglamento (CE) N° 1177/2003 del Parlamento Europeo y del Consejo relativo a las estadísticas comunitarias sobre renta y condiciones de vida (EU-SILC) en lo referente a definiciones y definiciones actualizadas, 17 de noviembre de 2003, L298.

EUROPEAN COMMISSION, EUROSTAT, Directorate Social Statistics And Information Society, Unit Health And Food Safety, Data collection on 18 HIS ítems: 2004 round, Summary survey methodology, march 2004.

EUROSTAT, STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES: Unit F1: Demographic and migration statistics, http://europa.eu.int/estatref/info/sdds/en/demo/dem_o_dfer_sm.htm#top, consulta 20 de abril de 2006.

EUROSTAT, STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES, Unit F5 Health and food safety statistics, http://europa.eu.int/estatref/info/sdds/en/hlth/hlth_c_death_base.htm, consultation Avril 20th, 2006.

EUROSTAT, STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES, Unit F4: Education, science and culture statistics, Education Statistics Eurostat Metadata in SDDS format: Summary Methodology, http://europa.eu.int/estatref/info/sdds/en/educ/educ_sm.htm, consultation Avril 21th, 2006.

EUROSTAT, STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES, Unit F3 Living conditions and social protection statistics, Income

and living conditions (ECHP) Eurostat Metadata in SDDS format: Summary Methodology.

http://europa.eu.int/estatref/info/sdds/en/ilc/ilc_sm01.htm, consultation May 12th, 2006.

EUROSTAT, STATISTICAL OFFICE OF THE EUROPEAN COMMUNITIES, Unit F2 Labour Market Statistics, National Accounts & LFS breakdowns, Eurostat Metadata in SDDS format: Summary Methodology.

http://europa.eu.int/estatref/info/sdds/en/strind/ecobac_eg_sm.htm.

INSTITUTO NACIONAL DE ESTADÍSTICA ESPAÑA (1991): Encuesta de Población Activa. Descripción de la encuesta, definiciones e instrucciones para la cumplimentación del cuestionario, INE Artes Gráficas, Madrid.

INE (1994): Encuesta de Población Activa. Tratamiento de la información, INE Artes Gráficas, Madrid.

INE (1999): Encuesta de Población Activa 1999. Descripción de la encuesta, definiciones e instrucciones para la cumplimentación del cuestionario, INE Artes Gráficas, Madrid.

INE (1999): Encuesta de Población Activa 1999. Tratamiento de la información. INE Artes Gráficas, Madrid.

INE (2000): Encuesta de Población Activa 2000. Descripción de la encuesta, definiciones e instrucciones para la cumplimentación del cuestionario, INE Artes Gráficas, Madrid.

INE (2002): Encuesta de Población Activa 2002. Tratamiento de la información. INE Artes Gráficas, Madrid.

INE (2005): Cuestionario relativo a la Encuesta de Población Activa. INE.

<http://www.ine.es/daco/daco42/daco4211/epacues.htm>.

OFFICIAL JOURNAL OF THE EUROPEAN UNION Commission Regulation (EC) No 750/2005, of 18 May 2005, on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States (Text with EEA relevance) Official Journal of the European Union L 126/12.

OFFICIAL JOURNAL OF THE EUROPEAN UNION, Commission Regulation (EC) No 1897/2000, of 7 September 2000 implementing Council Regulation (EC) No 577/98 on the organization of a labor force sample survey in the Community concerning the operational definition

of unemployment. Official Journal of the European Communities 8 September 2000, L 228/18.

UNESCO General Conference, Twenty-ninth Session, Paris 1997 29 C, 29 C/20, 8 August 1997, Item 6.1 of the provisional agenda REVISION OF THE INTERNATIONAL STANDARD CLASSIFICATION OF EDUCATION (ISCED).

FERNANDEZ QUINTANILLA, J., MAHIA CORDERO, J., GIRARDOT, J. -J., MASSELOT, C., 2006: "ACCEM observation strategy", in: *Acts of International Conference of Territorial Intelligence*, ALBA IULIA (Romania), September 20th-22nd, 2006, 8 p. <URL: <http://www.territorial-intelligence.eu/telechargement/albaiulia2006/Alba06-Fernandez.pdf>>

GIRARDOT, J. -J., 2006: "Activities and prospects of research activities concerning tools of territorial intelligence for sustainable development actors. Work Package 6 "Tools for Actors" of CAENTI", in: *Acts of International Conference of Territorial Intelligence*, ALBA IULIA (Romania), September 20th-22nd, 2006, 8 p. <URL: <http://www.territorial-intelligence.eu/telechargement/albaiulia2006/Alba06-Girardot3.pdf>>

DELVOYE, J.-M., GIRARDOT J.-J., 2005: « Les outils de l'Intelligence Territoriale pour les acteurs de terrain à Seraing : entre appropriation des méthodes et acquisition de compétences », in : 3e colloque international du Réseau Européen d'Intelligence Territoriale, LIÈGE (Belgique), 20-21 octobre, 2005 7 p. <URL: <http://mti.univ-fcomte.fr/reit>>

EUROPEAN GUIDE OF DIAGNOSIS AND EVALUATION

ID AND TERRITORIAL INFORMATION

- User id:** *(see table of groups)* **Observation:**
- [001] Structure:** *(see table of structures)*
- [002] Action:** *(see table of actions)*
- [003] Referent:** *(see table of referents)*
- [004] With is your residence country?** *(see table of countries)*
- [005] Which is your residence region?** *(see table of regions)*
- [006] Which is your residence municipality?** *(see table of municipalities)*
- [007] Which is your residence district?** *(see table of districts)*

INFORMATION ABOUT INITIAL RECEPTION

- [008] Date of first reception:**
- [009] Who has derived you to our entity?**
- My own initiative
 - A public body of social service
 - A private body of social service (NGOs, associations, etc.)
 - Initiative of the person's entourage (partner, friends, etc.)
- [010] Which is your gender?**
- Male
 - Female
- [011] Which is your date of birth?**
- [012] Indicate your class of age:**
- Less than 15
 - From 15 to 17
 - From 18 to 24
 - From 25 to 34
 - From 35 to 44
 - From 45 to 54
 - From 55 to 64
 - From 65 to 74
 - 75 and more
- [013] Which is your nationality?**
- National
 - EU foreign nationality
 - Foreign nationality out of EU
- If you are a foreigner:*
- [014] Do you accept to indicate the country of your nationality?**
- Yes
 - No

If you accept:

- [015] **What is the country of your nationality? (see table of countries).....**
- [016] **What is your current way of life?**
- . With parents, family or friends
 - . In couple (with or without children)
 - . Alone (with or without children)
- [017] **Do you have minor children?**
- . Yes
 - . No
- [018] **Do you have other dependent people?**
- . Yes
 - . No
- [019] **What is your type of household?**
- . Only a core
 - . Several cores
 - . Collective household
- [020] **What is your present studies level?**
- . Never gone to school
 - . Pre-primary level of education (*level 0*)
 - . Primary level of education (*level 1*)
 - . Lower secondary level of education (*level 2*)
 - . Upper secondary level of education (*level 3*)
 - . Post-secondary, non tertiary education (*level 4*)
 - . First stage of tertiary education (*level 5*)
 - . Second stage of tertiary education (*level 6*)
- [021] **Do you possess communication skill in the language of your residence community?**
- . Yes
 - . No
- [022] **What is your main current situation (*only one answer*)?**
- . Work with remuneration (autonomous, paid, member of a cooperative, family help, etc.)
 - . Unemployed with subsidy
 - . Unemployed without subsidy
 - . Student (even on holiday)
 - . Permanent disability
 - . Retired, pensioner
 - . Works in the household
 - . Others types of labour inactivity
- [023] **Which is your main income source (*only one answer*)?**
- . Does not have any income
 - . Does not know, does not answer
 - . Wage or incomes coming from the work
 - . Unemployment compensation, unemployment benefits
 - . Old age pension
 - . Permanent disablement pension
 - . Alimony
 - . Family allowances
 - . Revenues of property capital (rents, dividends, interests, revenues of the intellectual property, revenues of the insurance companies and pensions coming from private companies)

. Other incomes, subsidies, pensions and regular benefits

[024] What is your mode of current housing (*only one answer*)?

- . Without any housing
- . In paid property
- . In property in course of payment
- . Hiring or sub-renting
- . Reception in emergency housing or in temporary housing
- . Cohabitation (with participation) with relatives or friends
- . Free housing with relatives and friends
- . Gratuitous cession
- . Welcome family

[025] How is your health in general?

- . Very good
- . Good
- . Average
- . Bad
- . Very bad

[026] During the past 6 months or more, have you been limited in activities people usually do, because of a health problem?

- . Yes, I was strongly limited
- . Yes, I was limited
- . No, it was not limited

[027] What type of Social Security cover do you have as a holder or a recipient?

- . Without Social Security cover
- . Public assistance (social security, mutual)
- . Private insurance (collective affiliation or obligatory individual or voluntary)
- . Without any mode of contribution, but with a medical assistance provided by the national Health system
- . Without any mode of contribution, but with medical assistance provided by a NGO

PERSONAL DATA AND FAMILY UNIT

[028] What is your present marital status?

- . Single
- . Married
- . Separate or divorced
- . Widowed

[029] What is your current position within the household?

- . Reference person
- . Partner of the reference person
- . Son or daughter
- . Other relatives of the reference person (father, mother, parent-in-law, other relative or partner of the latter)
- . Without any family relationship with the reference person

[030] Are you moved from your usual home country?

- . Yes
- . No

If you moved from your usual home country:

[031] Is it ?

- . In a temporary way
- . In a definitive way

. Without determined duration

[032] Have you followed studies during the four latest weeks?

. Yes (even if holiday period)

. No

If you followed studies:

[033] What is your field of studies?

. Education

. Humanities and arts

. Social sciences, business and law

. Science

. Engineering, manufacturing and construction

. Agriculture

. Health and welfare

. Services

[034] How many members, *including you*, reside within the household?

. 1

. 2

. 3 or 4

. 5 or more

[035] Are there dependent minors in your household?

. Yes

. No

If there are dependent minors in your household:

[036] How many?

. 1

. 2

. 3 or 4

. 5 or more

[037] How old are they (*one answer by class, you can indicate several responses*)?

. From 0 to 2 years

. From 3 to 5 years

. From 6 to 10 years

. From 11 to 14 years

. 15 years and more

[038] Do you have dependent minors out of your household?

. Yes

. No

If you have dependent minors out of your household:

[039] How many?

. 1

. 2

. 3 or more

[040] How old are they (*one answer by class, you can indicate several answers*)?

. From 0 to 2 years

. From 3 to 5 years

. From 6 to 10 years

- . From 11 to 14 years
- . 15 years and more

[041] Are there other dependent people in your household?

- . Yes
- . No

If yes:

[042] How old are they (one answer by class, you can indicate several answers)?

- . Less than 25 years
- . From 26 to 49 years
- . 50-69 years
- . 70 years and more

[043] What is the structure of your household?

- . I am alone
- . Father or mother (an adult) with dependent children
- . Two adults
- . Two adults with dependent children
- . Three adults or more
- . Three adults or more with dependent children
- . Collective household
- . Other situations

[044] What kind of incomes do have in your household?

- . Fixed.
- . Discontinuous
- . Temporary
- . Does not know or does not answer

[045] What are the monthly incomes of your household?

- . Less than 250 €
- . From 250 € up to 499 €
- . From 500 € up to 999 €
- . From 1000 € up to 1499 €
- . From 1500 € up to 1999 €
- . From 2000 € up to 2999 €
- . From 3000 € up to 3999 €
- . From 4000 € up to 4999 €
- . 5000 € and more

[046] What are the income sources of the household (you can check several answers)?

- . Does not have any income
- . Does not know, does not answer
- . Wage or incomes coming from the work
- . Unemployment compensation, unemployment benefits
- . Old age pension
- . Permanent disablement pension
- . Alimony
- . Family allowances
- . Revenues of property capital (rents, dividends, interests, revenues of the intellectual property, revenues of the insurance companies and pensions coming from private companies)
- . Other incomes, subsidies, pensions and regular benefits

HOUSING

[047] In which type of lodging do you presently live?

- . Homeless
- . Uni-familiar housing
- . Flat, apartment
- . Housing that is situated in a building that is usually assigned to other uses (school, office, workshop)
- . Collective housing (monastery, convent, barracks, asylums, residence, guest houses, institutions, etc)
- . Mobile accommodation
- . Fixed accommodation (cabin, shacks, cave, huts, etc.)

If you are not homeless:

[048] Do you consider that the habitability conditions of your type of lodging are acceptable?

- . Yes
- . No

[049] Are there difficulties associated to the housing (you can check several answers)?

- . None
- . Lack of space
- . Delinquency or vandalism in the area
- . Noises that are produced by the neighbours
- . Other noises coming from the outside (traffic, adjacent manufactures, etc)
- . Insufficient natural light in some or all the rooms
- . Lack of appropriate heating installation
- . Leaks, humidity
- . Rot on floors or wood-windows (too old housing)
- . Without kitchen.
- . Without bathroom.

[050] Do you have difficulties of access or maintenance of your present housing ?

- . Yes
- . No

If yes:

[051] What kind of difficulties of access do you have (you can check several answers)?

- . Yes, in course of evacuation procedure
- . Yes, risk of evacuation or embargo
- . Yes, difficulties to get an housing or to find another one (incomes problems)
- . Yes, other situations

[052] Number of rooms of your housing ?

- . 1
- . 2
- . 3
- . 4
- . 5 or more

[053] In an approximate way, which is the total area of your housing?

- . Less than 20 m²
- . From 20 m² to 39 m²
- . From 40 m² to 69 m²
- . From 70 m² to 99 m²
- . From 100 m² to 149 m²
- . 150 m² or more

[054] Did you change housing during the latest year?

- . Yes
- . No

[055] Did you change your commune residence during the latest year?

- . Yes
- . No

HEALTH CONTEXT

[056] In the daily life, do you have any difficulty to feed yourself

- . Can do it alone
- . Can do it but with someone else help
- . Can not do it

[057] In the daily life, do you have any difficulty to get up and go to bed

- . Can do it alone
- . Can do it but with someone else help
- . Can not do it

[058] In the daily life, do you have any difficulty to get dressed and get undressed

- . Can do it alone
- . Can do it but with someone else help
- . Can not do it

[059] In the daily life, do you have any difficulty to have a bath or a shower

- . Can do it alone
- . Can do it but with someone else help
- . Can not do it

[060] Do you have any long-standing illness or health problem?

- . Yes
- . No

[061] Do you suffer from a handicap that is medically recognized?

- . Yes
- . No

If yes:

[062] What kind of handicap (you can check several responses)?

- . Physical
- . Psychic
- . Sensory

[063] If you suffer from a physical handicap, what is the percentage?

- . No percentage allowed
- . From 0 to 49%
- . From 50% to 79%
- . Up from 80%

[064] If you suffer from a psychic handicap, what is the percentage?

- . No percentage allowed
- . From 0 to 49%
- . From 50% to 79%
- . Up from 80%

- [065] **If you suffer from a sensory handicap, what is the percentage?**
.
No percentage allowed
.
From 0 to 49%
.
From 50% to 79%
.
Up from 80%
- [066] **Approximately, what is your weight (in kilos)?**I I I I
- [067] **Approximately, what is your height (in centimetres)?**I I I I
- [068] **How would you rate your life quality?**
.
Very good
.
Good
.
Neither poor nor good.
.
Poor
.
Very poor
.
Does not know or does not want to answer
- [069] **Do you smoke?**
.
Does not smoke
.
Less than 20 cigarettes per day
.
20 or more cigarettes per day
.
Former smoking: used to smoke occasionally
.
Former smoking: used to smoke daily
- [070] **Have you consumed alcohol during the latest 4 weeks?**
.
Yes
.
No
- [071] **Have you consumed alcohol during the latest 12 months?**
.
Yes
.
No
- [072] **Have you consumed cannabis in the latest 30 days?**
.
Yes
.
No
- [073] **Have you consumed cannabis in the latest 12 months?**
.
Yes
.
No
- [074] **Do you follow or did you follow a special diet?**
.
Yes
.
No
- [075] **During the latest three years, did you change your food practices, so as to loose weight?**
.
Yes
.
No

INDIVIDUAL AND SOCIAL AUTONOMY

- [076] **Do you have a driving licence (valid in the residence country)?**
.
Yes
.
No
- [077] **Do you have a personal car?**
.
Yes
.
No
- [078] **Do you have a personal motorcycle?**
.
Yes
.
No
- [079] **Do you usually use the public transports to move?**
.
Yes
.
No

If no,

[080] What is the reason?

- . Use of a private transport
- . Make my displacements by foot
- . There is not in the residence place
- . Can not afford it

[081] Can you speak the language of your residence country or community?

- . Fluently
- . A little
- . No

[082] Can you write the language of your residence country or community?

- . Fluently
- . A little
- . No

[083] Can you read the language of your residence country or community?

- . Fluently
- . A little
- . No

[084] Do you belong to any association in the place where you usually live?

- . Associations of pupils, pupils' fathers or mothers
- . Associations of consumers, of women, of youth, of protection of nature, of migrants, of drug addicts
- . Religious associations
- . Political association, or union organizations
- . Sports or cultural associations (chorus, groups of music, sporting associations, etc.)
- . Professional associations (professional associations, associations of industrialists, etc.)
- . None

[085] Did you use a computer during the latest month?

- . Yes
- . No
- . I never use it

[086] Did you use Internet during the latest month?

- . Yes
- . No
- . I never use it

EMPLOYMENT

[087] Last week (from Monday to Sunday), **did you do any work for pay or profit** even if it was during one hour and even if it had a sporadic or occasional form? Pay includes payments or “payment in kind” (payment in goods or services instead of money). It can be done for someone else (salaried worker), or as a corporate manager or a self-employed worker or unpaid family worker.

- . Yes
- . No, I did not work last week.

Although you did not work last week,

[088] Did you have a job but you did not go to for any reason as holidays, illness, studies, maternity or paternity permission, working conflict, etc.?

- . Yes
- . No

If you worked last week or if you have a job you did not go for a previous reason:

[089] For what person or organism did you work?

- . Self-employment (with or without salaried worker)
- . As a member of a cooperative
- . As a salaried of a non-profit organisation or association
- . Working in a public service (public salaried worker)
- . Working for someone else in the private sector (private salaried worker)
- . Working, as an unpaid family worker

[090] Do you have an employment contract (even a verbal one)?

- . Yes
- . No

[091] How is your present job?

- . Indefinite (permanent or discontinuous)
- . Temporary

[092] How much time do you work by week?

- . 25% legal full time or less
- . up 25% to 50 % legal full time
- . up 50% to a legal full time
- . more than a legal full time

[093] How would you qualify your present conditions of work?

- . Very good
- . Good
- . Acceptable
- . Bad
- . Very bad

If you did not work last week (and did not have job to go):

[094] Did you actively seeking work as paid employment or self-employment, or did you find a job to start later?

- . Yes
- . No

[095] 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 following two weeks?

- . Yes
- . No

[096] Did you previously do a job, either as paid employment or self-employment or as an unpaid family worker?

- . Yes
- . Yes, between 2 and 8 years ago
- . Yes, but more than 8 years ago
- . No

[097] Do you actively seeking another work?

- . Yes
- . No

If yes :

[098] In which situation were you before your search for a job?

- . Employment

- . Unemployed with subsidy
- . Unemployed without subsidy
- . Student
- . Retired, pensioner
- . Closed a trade
- . Disability to work
- . Work in the household
- . Other type of labour inactivity

[099] Presently, do you make employment training?

- . Yes
- . No

If yes,

[100] Precise in which field:

- . Education
- . Humanities and arts
- . Social sciences, business and law
- . Science
- . Engineering, manufacturing and construction
- . Agriculture
- . Health and welfare
- . Services

[101] At the same period, in which situation were you last year?

- . Employment
- . Unemployed with subsidy
- . Unemployed without subsidy
- . Student
- . Retired, pensioner
- . Closed a trade
- . Disability to work
- . Work in the household
- . Other type of labour inactivity

[102] What is the type of your present or latest (in case of unemployment) job? (see type of job table)I_I_I_I

[103] What is the economical activity of your present or latest (in case of unemployment) job? (see table of economical activities)I_I_I_I

PROJECT

[104] Among the following services, what are the activities that meet your main needs and that you commit to do until the end of this year?

- . Non-determined activities

Employment and Training:

- . Accompaniment to create a firm
- . Job coaching
- . Qualification or apprenticeship contract
- . Employment in an insertion structure
- . Solidarity employment
- . Practices coaching
- . General training
- . Professional training
- . Professional check-up

. Dealing with the training expenses

Housing:

- . Accompaniment to seek for housing
- . Advise to the tenure of the housing
- . Accompaniment to the housing appropriation
- . Financial help to improve or renovate the housing
- . Financial help to pay the rent or housing drafts
- . Intervention of a housing fund
- . Lodging
- . Access to an insertion or a transitory lodging

Health context:

- . Medical check-up
- . General medical treatment
- . Nurse cares
- . Medical help at home
- . Physical therapy or psychomotor cares
- . Dental cares
- . Dietary cares
- . Specialized medical treatment
- . palliative treatment
- . Individual therapy
- . Couple therapy
- . Family therapy
- . Family planning
- . Health prevention
- . Sports
- . Accompaniment of the treatment
- . Opening of social rights
- . Dealing with the medical expenses

Individual and social autonomy:

- . Literacy
- . Fight against illiteracy
- . Accompaniment for the daily organisation
- . Accompaniment of administrative steps
- . Budget educational accompaniment
- . Finalized financial help
- . Taking into account of the financial situation
- . Implementation of a trust or a legal guardianship
- . Debts negotiation
- . Request of solidarity income
- . Hygiene cares
- . Domestic help
- . Donation or landing of equipment
- . Translation, letter writer
- . Legal advice
- . Family mediation
- . Alimentary help
- . Collective or community activities
- . Cultural activities
- . Social balance
- . Personal social accompaniment
- . Familial social accompaniment
- . Measure of childhood protection
- . Educational support destined to the children
- . Psycho-medical help or prevention at school

- . Financial help for the custody
- . Practice of driving
- . Accompaniment for transports and mobility

EVALUATION

[105] Among the following services, what are the activities you did last year?

- . Non-determined activities

Employment and Training:

- . Accompaniment to create a firm
- . Job coaching
- . Qualification or apprenticeship contract
- . Employment in an insertion structure
- . Solidarity employment
- . Practices coaching
- . General training
- . Professional training
- . Professional check-up
- . Dealing with the training expenses

Housing:

- . Accompaniment to seek for housing
- . Advise to the tenure of the housing
- . Accompaniment to the housing appropriation
- . Financial help to improve or renovate the housing
- . Financial help to pay the rent or housing drafts
- . Intervention of a housing fund
- . Lodging
- . Access to an insertion or a transitory lodging

Health context:

- . Medical check-up
- . General medical treatment
- . Nurse cares
- . Medical help at home
- . Physical therapy or psychomotor cares
- . Dental cares
- . Dietary cares
- . Specialized medical treatment
- . palliative treatment
- . Individual therapy
- . Couple therapy
- . Family therapy
- . Family planning
- . Health prevention
- . Sports
- . Accompaniment of the treatment
- . Opening of social rights
- . Dealing with the medical expenses

Individual and social autonomy:

- . Literacy
- . Fight against illiteracy
- . Accompaniment for the daily organization
- . Accompaniment of administrative steps
- . Budget educational accompaniment
- . Finalized financial help
- . Taking into account of the financial situation

- . Implementation of a trust or a legal guardianship
- . Debts negotiation
- . Request of solidarity income
- . Hygiene cares
- . Domestic help
- . Donation or landing of equipment
- . Translation, letter writer
- . Legal advice
- . Family mediation
- . Alimentary help
- . Collective or community activities
- . Cultural activities
- . Social balance
- . Personal social accompaniment
- . Familial social accompaniment
- . Measure of childhood protection
- . Educational support destined to the children
- . Psycho-medical help or prevention at school
- . Financial help for the custody
- . Practice of driving
- . Accompaniment for transports and mobility

[106] What are the main changes in your personal situation during the latest year?

- . Creation of a firm
- . Work contract of a duration of more than 6 months
- . Work contract of a duration of less than 6 months
- . Work contracts that benefits from a public support
- . Insertion employment
- . Solidarity employment
- . Qualification or apprenticeship contract
- . Professional training that gives a qualification
- . Training that does not give any qualification
- . Getting of the driving licence (light vehicle)
- . Access to an autonomous housing
- . Improvement of the housing conditions
- . Emergency lodging
- . Transitory lodging
- . Getting of the social coverage
- . Improvement of autonomy as regards Health
- . Improvement of expression
- . Improvement of your budget situation
- . Progress in the personal autonomy
- . Does not need any more a personal accompaniment
- . Does not need any more a family accompaniment
- . Situation without solution
- . Renunciation
- . House moving out of the intervention area
- . Imprisonment
- . Decease

[107] Are you globally satisfied of the services you use during the latest year?

- . I am very satisfied
- . I am satisfied
- . I am not satisfied
- . I am not satisfied at all

[108] Thank you to indicate personal comments:

Tables:

Table of structures: define by the project.

Table of actions: define by the project.

Table of referent: define by the project.

Table of countries

Table of municipalities: define by the project from a national or regional list.

Table of regions: define by the project from a national list.

Table of districts: define by the project

Table of incomes: National incomes classification

Table of type of jobs: National jobs classification

Table of sectors of economical activity (Economical Activities National Classification)